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ABSTRACT

These skill standards, developed through a consortium of educational and industry partners in Illinois, serve as guides to workforce preparation program providers to define content for their programs and to employers to establish the skills and standards necessary for job acquisition and performance. The skill standards include the following components for each skill defined: performance area; performance skill; skill standard; and performance elements and assessment criteria. This publication contains skill standards for medical office personnel defined on three levels by increasing level of difficulty. The skill standards are grouped in the following areas: (1) organization and planning; (2) maintenance of equipment and supplies; (3) medical office activities; (4) medical dictation and transcription duties; (5) preparation of medical records and insurance forms; (6) financial functions; (7) management of records and files; (8) mail handling; (9) basic office operations; (10) information processing activities; (11) word processing; (12) machine transcription; (13) basic data processing; (14) computer file manipulation; (15) document processing; (16) database and spreadsheet operations; and (17) computer applications. Each area contains 3-21 standards. The following items are appended: glossary; lists of Illinois Occupational Skill Standards and Credentialing Council, Business and Administrative/Information Services Subcouncil, Health and Social Services Subcouncil, and Medical Offices Standards Development Committee members; Business and Administrative/Information Services Subcouncil Medical Office Occupations Cluster Recognition Proposal; and a list of workplace skills. (KC/MN)

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# ILLINOIS

## OCCUPATIONAL SKILL STANDARDS

# MEDICAL OFFICE CLUSTER

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## ILLINOIS OCCUPATIONAL SKILL STANDARDS
## MEDICAL OFFICE CLUSTER

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# ILLINOIS OCCUPATIONAL SKILL STANDARDS

# MEDICAL OFFICE CLUSTER

**Endorsed for Illinois**
**by the**
**Illinois Occupational Skill Standards and Credentialing Council**

## MESSAGE TO ILLINOIS CITIZENS

**Dear Citizens of Illinois:**

Preparing youth and adults to enter the workforce and to be able to contribute to society throughout their lives are critical to the economy of Illinois. Public and private interest in establishing national and state systems of industry-driven skill standards and credentials is growing in the United States, especially for occupations that require less than a four-year college degree. This interest stems from the understanding that the United States will increasingly compete internationally and the need to increase the skills and productivity of the front-line workforce. The major purposes of skill standards and credentialing systems are to promote education and training investment and ensure that this education and training enable students and workers to meet industry standards that are benchmarked to our major international competitors.

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) has been working with industry subcouncils, the Illinois State Board of Education and other partnering agencies to adopt, adapt and/or develop skill standards for high-demand occupations. This document represents the work of the Business and Administrative/Information Services Subcouncil and the Health and Social Services Subcouncil and the associated standards development committee. Through this collaborative effort, skill standards products are being developed for a myriad of industries, occupational clusters and occupations. Upon completion of these products, there will be a period of feedback and comment from business, industry and labor representatives, as well as educators.

These documents will serve as guides to workforce preparation program providers to define content for their programs and to employers to establish the skills and standards necessary for job acquisition. These standards will also serve as a mechanism for communication among education, business, industry and labor.

We encourage you to review these standards and share your comments. This effort has involved a great many people from business, industry and labor. Comments regarding their usefulness in curriculum and assessment design, as well as your needs for inservice and technical assistance in their implementation, are critical to our efforts to move forward and improve the documents. A feedback instrument is included with this document.

Questions concerning this document may be directed to:

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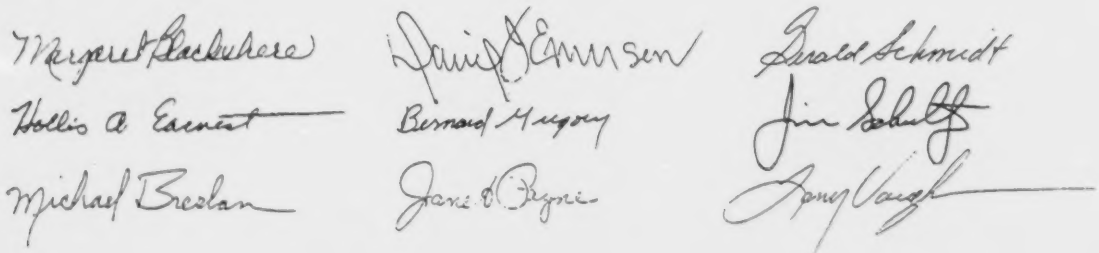
We look forward to your comments.

Sincerely,

The Members of the IOSSCC



## THE ILLINOIS PERSPECTIVE

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) endorses occupational skill standards and credentialing systems for occupations that (a) require basic workplace skills and technical training, (b) provide a large number of jobs with either moderate or high earnings, and (c) provide career advancement opportunities to related occupations with moderate or high earnings. The nine-member Council was established by the Occupational Skill Standards Act (PA 87-1210). The council, representing business, industry and labor and working with the Illinois State Board of Education in partnership with the Illinois Community College Board, Illinois Board of Higher Education, Illinois Department of Employment Security and Illinois Department of Commerce and Community Affairs, has created a common vision for workforce development in Illinois.

### Vision

It is the vision of the IOSSCC to develop a statewide system of industry-defined and recognized skill standards and credentials for all major skilled occupations providing strong employment and earnings opportunities in Illinois. Information related to occupational employment and earning opportunities is determined by the Illinois Occupational Information Coordinating Committee (IOICC) in cooperation with business and industry.

### Subcouncils and Standards Development Committees

The Council developed industry subcouncils (representing all major industries in Illinois) to review, approve and promote occupational skill standards and credentialing systems. In cooperation with organizations such as the Illinois Chamber of Commerce, the Illinois AFL-CIO, the Illinois Manufacturers' Association and others, the Council established the first five subcouncils in 1995—Agricultural and Natural Resources, Manufacturing, Health and Social Services, Hospitality, and Business and Administrative/Information Services.

The remaining subcouncils include Applied Science and Engineering Services; Legal and Protective Services; Transportation, Distribution and Logistics; Educational Services; Financial Services; Marketing and Retail Trade; Communications; Construction; and Energy and Utilities.

The Standards Development Committees, composed of business, labor and education representatives, are experts in the related occupational cluster and work with the product developer to

- develop or validate occupational skill standards,
- identify related academic skills,
- develop or review assessment or credentialing approaches, and
- recommend endorsement of the standards and credentialing system to the industry subcouncil.

## Expected Benefits for Employers, Educators, Students and Workers

Occupational skill standards and credentialing systems are being developed and promoted by the IOSSCC to improve Illinois' competitiveness. Such standards and credentialing systems provide a common language for employers, workers, students and education and training providers to communicate skill requirements and quality expectations for all major industry and occupational areas.

### For Employers, skill standards will

- Improve employee recruitment and retention by more clearly identifying skill requirements,
- Encourage improved responsiveness and performance of education and training providers,
- Enlarge the pool of skilled workers,
- Focus attention on the importance of training investment.

**For Education and Training Providers, skill standards will**

- Provide information on all major industries and occupations,
- Contribute to program and curriculum development,
- Strengthen relationships between educators and training providers,
- Improve career planning.

**For Students and Workers, skill standards will**

- Foster better decision making concerning careers and the training necessary to acquire well-paying jobs,
- Allow more effective communication with employers about what they know and can do,
- Allow more effective work with employers in career development and skill upgrading.

## IOSSCC Requirements for Occupational Skill Standards

Any occupational skill standards and credentialing system seeking IOSSCC endorsement must

- represent an occupation or occupational cluster which meets the criteria for IOSSCC endorsement;
- address both content and performance standards for critical work functions and activities for an occupation or occupational area;
- ensure formal validation and endorsement by a representative group of employers and workers within an industry;
- provide for review, modification and revalidation by an industry group a minimum of once every five years;
- award credentials based on assessment approaches that are supported and endorsed by the industry and consistent with nationally recognized guidelines for validity and reliability;
- provide widespread access and information to the general public in Illinois;
- include marketing and promotion by the industry in cooperation with the partner state agencies.

### Definitions and Endorsement Criteria

The definitions and endorsement criteria are designed to promote the integration of existing and future industry-recognized standards, as well as the integration of the Illinois academic and occupational skill standards. Because all skill standards must address the critical work functions and activities for an occupation or industry/occupational area, the Council further defined three major components:

- ***Conditions of Performance:*** The information, tools, equipment and other resources provided to a person for a work performance.
- ***Statement of Work:*** A description of the work to be performed by a person.
- ***Performance Criteria:*** The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedural requirements (e.g., safety, standard professional procedures) and time and resource requirements. The IOSSCC also requires performance criteria to be further specified by detailed individual performance elements and assessment criteria.

The IOSSCC is currently working with the Illinois State Board of Education and other state agencies to integrate the occupational standards with the Illinois learning standards which describe what students should know and be able to do as a result of their education. The Council is also working to integrate workplace skills—problem solving, critical thinking, teamwork, etc.—with both the learning and occupational skill standards.

## The Illinois Model

Illinois Occupational Skill Standards describe what people should know and be able to do and how well these skills and knowledge will be demonstrated in an occupational setting. They focus on the most critical work performances for an occupation or occupational area. As seen in the following model, Illinois Occupational Skill Standards contain at least these areas:

- Performance Area
- Performance Skill
- Skill Standard
- Performance Elements and Assessment Criteria

The Assessment and Credentialing Approach section may also be included at the direction of the individual standards development committee.

Illinois Occupational Skill Standards also carry a coding at the top of each page identifying the state, fiscal year in which standards were endorsed, subcouncil abbreviation, cluster abbreviation and standard number. For example, the twenty-fifth skill standard in the Medical Office Cluster, which has been developed by the Business and Administrative/Information Services Subcouncil and the Health and Social Services Subcouncil, would carry the following coding: IL.97.BAI.MO.25

A model for Illinois Occupational Skill Standards showing the placement of the coding and providing a description of each area within a standard is contained on the following page.

**SUMMARY OF WORK TO BE PERFORMED. SUMMARY IS BRIEF AND BEGINS WITH AN ACTION VERB.**

IL. FY. SUBCOUNCIL. CLUSTER. STANDARD NO.

**PERFORMANCE AREA**

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

Includes all information, tools, equipment and other resources provided to the learner for performing the work.

### WORK TO BE PERFORMED

Provides an overview of the performance with the major elements or steps being described under Performance Elements and Assesament Criteria.

### PERFORMANCE CRITERIA

Includes product characteristics (e.g., accuracy levels, appearance) and/or process or procedure requirements (e.g., safety requirements). Time limits, rates and/or speeds are specified in the Performance Criteria.

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

Statement of the major elements, components or steps of the overall performance and the assessment criteria for determining successful performance. Includes all major tasks, the knowledge to be demonstrated and specific assessment criteria.

## ASSESSMENT AND CREDENTIALING APPROACH

Optional statement of suggested assessment approaches for the performance which also refers to existing assessment and credentialing systems.

## DEVELOPMENTAL PROCESS

The Business and Administrative/Information Services Subcouncil met in September 1995. An in-depth study of the current labor market information was done during this initial meeting.

After studying the labor market information, it was decided that the medical office occupations cluster would be an occupational area for which performance skill standards would be developed. Other cluster areas were prioritized and priority status was given to information processing, administrative support, legal office occupations, computer software specialist, business computer programming, accounting occupations and human resources occupations. Management occupations for all the clusters were also give priority status. The Information Processing, Administrative Support and Legal Office Occupational Skill Standards have been completed and approved by the Illinois Occupational Skill Standards and Credentialing Council.

A product developer knowledgeable with the medical office occupations cluster began the process of performance skill identification in the summer of 1996. Given the range of skills within this cluster, the initial charge for the product developer was to prepare an organizational framework that would address the major skills expected in the workplace.

Common and accepted references provided reinforcement for the direction given in the occupational framework. Those references included current texts used by educational institutions, curriculum guides from Illinois and other states, V-TECS guides from many states, contact with secondary and postsecondary instructors, JTPA trainers at the community college level, vocational student organization competency testing and many professional journals.

A standards development committee composed of workers at all levels within this cluster was convened. The framework and initial outline of performance skills were presented to the standards development committee for review, adjustment and/or validation. During the first meeting the framework and the outline of skills were finalized. Work then started on the development of the skill standards statements and the elements/ assessment criteria in accordance with the direction established by the Illinois Occupational Skill Standards and Credentialing Council. The product developer submitted the first draft of the performance skill standards to the standards development committee for review in the fall of 1996. The standards development committee met three times to review the skill standards statements and made recommendations for revisions. Persons on the standards development committee worked on various areas in the performance skill standards. These persons used the fax and telephone throughout this process in communicating with the product developer. All members of the standards development committee then reviewed and agreed to the final performance skill standards.

The performance skill standards were provided to the Business and Administrative/Information Services Subcouncil and approval of the medical office occupations cluster was received. Letters of support from the Subcouncil members are available upon request from the Illinois State Board of Education. Lists of the Subcouncil and Standards Development Committee members are found in Appendixes C and D, respectively.

The Business and Administrative Services Subcouncil and the Standards Development Committee for the medical office occupations cluster identified the occupations for which performance skill standards would be developed. The medical office occupations were identified as follows:

**Level 1: Health Care Clerical Personnel**
**Medical Clerical Support Personnel**
**Level 2: Health Information Processor**
**Level 3: Medical Secretary Personnel**

These three occupational areas, generally found in clinics and medical offices, typically include the following responsibilities.

### Level 1: Health Care Clerical Personnel or Medical Clerical Support Personnel

Organizes and plans by prioritizing own work, taking notes, establishing and maintaining a reminder system, distributing materials, demonstrating office procedures and equipment as appropriate, delegating work to others when applicable and improving office procedures. May requisition, inventory and maintain office supplies and equipment as well as perform routine maintenance on office equipment. May perform medical office activities such as scheduling appointments, receiving and storing medical supplies, maintaining reception room and obtaining notarization of a document.

May prepare medical records and insurance forms by assisting patients with registration process, completing third-party-payer forms and completing birth certificates. May perform financial duties such as collecting and processing fees, issuing receipts, inspecting invoices for accuracy and preparing and posting petty cash vouchers.

May manage records and files by establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages. May perform other office duties by performing receptionist duties, getting documents notarized and searching informational sources. May perform information processing duties.

### Level 2: Health Information Processor

Organizes and plans by prioritizing own work, taking notes, establishing and maintaining a reminder system, distributing materials, demonstrating office procedures and equipment as appropriate, delegating work to others when applicable and improving office procedures. May requisition, inventory and maintain office supplies and equipment as well as perform routine maintenance on office equipment.

May perform medical office activities by having documents notarized, reviewing technical journals for articles of interest and making entries in communication log. May perform medical dictation/ transcription duties. May prepare medical records and insurance forms by preparing entry-level coding appropriate to physician's office or clinic and reviewing medical records for completeness and accuracy. May manage records and files such as establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages. May perform other office duties such as receptionist duties, getting documents notarized, searching informational sources, answering routine correspondence and taking minutes at meetings. May perform information processing activities.

### Level 3: Medical Secretarial Personnel

Organizes and plans by prioritizing own work, keeping appointment calendar for supervisor, planning on-site meetings, making domestic and international travel arrangements and preparing itinerary, delegating work to others when applicable, arranging for one- and three-day off-site conferences, planning receptions and dinners, making travel arrangements for clients and visitors, composing and updating written office procedures, developing liaisons with professional organizations and planning and recommending physical layout of the office.

May maintain and inventory equipment, supplies and software. May perform medical office activities such as scheduling appointments, receiving and storing medical supplies, maintaining reception room, having documents notarized and reviewing technical journals for articles of interest.

May perform medical dictation/transcription duties by taking verbatim dictation using shorthand or speedwriting, taking dictation directly at the computer and transcribing medical documents.

May prepare medical records and insurance forms by registering new and established patients, doing basic coding appropriate to specific practice, reviewing medical records for completeness and accuracy and completing third-party-payer forms.

May perform financial duties for the medical office such as collecting fees and issuing receipts, completing payment vouchers, preparing checks, maintaining checkbook and reconciling bank statement, preparing travel vouchers, categorizing expenses and preparing expense reports, making journal entries, maintaining income and expense records, preparing office payroll and appropriate tax withholding reports and handling petty cash.

May manage records and files by establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages.

May perform other office duties such as performing receptionist duties, getting documents notarized, searching informational sources, maintaining personnel files and employee attendance/time sheets/ vacation records, answering routine correspondence and taking minutes at meetings. May perform information processing activities.

### Industry Commitment for Development and Updating

The development of these performance skill standards is a result of the efforts of the subcouncils and the standards development committee. The development effort utilized the following steps:

- Performance skills identified by the product developer
- Resources reviewed
- Standards development committee of incumbent workers convened
- Performance skills validated and approved by standards development committee
- Draft performance skill standards developed
- Skill standards reviewed by standards development committee
- Skill standards reviewed and approved by subcouncil
- Skill standards adopted by subcouncil

Lists of the Business and Administrative/Information Services and the Health and Social Services Subcouncils are located in Appendix C and the list of the Medical Office Occupations Standards Development Committee members is located in Appendix D.

### Industry Commitment for Marketing

The Business and Administrative/Information Services and the Health and Social Services Subcouncils are committed to marketing and obtaining support and endorsement from the business community impacted by these skill standards.

The subcouncils will encourage the availability of occupational skill standards to the public including learners, parents, workers, educators at all levels, employers and the industry organizations.

Letters of commitment from subcouncil members to this effort are available from the Illinois State Board of Education upon request.

## ASSUMPTIONS FOR MEDICAL OFFICE CLUSTER STANDARDS

**Skill standards statements assume:**

1. Workplace skills (employability skills) are expected of all learners. Socialization skills needed for work are related to the lifelong career experience and are not solely a part of the initial schooling process.
2. Specific policies and procedures of the worksite will be made known to the learner and will be followed.
3. Time elements outlined for the skill standards result from the experience and consideration of the panel of experts who made up the standards development committee.
4. Skills will progress from simple to complex. Once a skill has been successfully performed, it must be incorporated into more complex skills.
5. The selection of skill standards is not intended to embrace the entire skill base or body of current or future knowledge associated with the office occupations area.
6. Skill standards are developed to describe the skill only and do not detail the background knowledge or beginning skills needed to demonstrate the particular skill. In the medical office cluster, these background knowledges and beginning skills would include keyboarding, formatting, document processing, machine transcription, proofreading techniques, business composition, computer applications, computer knowledge, computer terms, phone operations, mail handling, information processing concepts, mathematical applications, business English applications, spreadsheet use and concepts, database use and concepts, desktop publishing concepts, office procedures, basic word and data processing concepts and many other background knowledges and beginning skills needed to receive credentialing in these performance skill standards. In addition, medical terminology constitutes background knowledge and skill needed for this cluster.
7. Although the skill standard enumerates steps to successful demonstration, rote approaches to the outcomes are not prescribed.
8. Skills are identifiable, measurable standards of practice which students may use to demonstrate competency to employers. Students may develop portfolios of competencies to accompany them into a competitive workplace.
9. Skill standards are selected because they meet industry and employer needs and professional standards of practice.
10. Skill standards are designed to reflect international standards for good medical office occupations practices.
11. Skill standards do not replace, supersede or substitute for procedure manuals.
12. Skill standards are performed under conditions consistent with safe practices.

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| | Scan Documents onto a Formatted Storage Medium and Import into a Word Processing Program | 204 |
| | Locate and Retrieve Information from a Variety of Electronic Sources | 206 |
| | Prepare, Place and Send Information on the Internet | 208 |
| | Key, Print and Store Transparency Masters for Presentation from Legible Longhand or Edited Rough Draft Using Presentation Software | 210 |
| **Database and Spreadsheet Operations** | Plan and Create Database, Input and Update Data into Records, Store Database and Print Quick Reports from Database | 212 |
| | Create Spreadsheet, Input Data into Spreadsheet, Update Data in Spreadsheet and Store Spreadsheet | 214 |
| **Computer Applications** | Create and Update Documents Using Desktop Publishing Features of a Word Processing Package or Desktop Publishing Software Package | 216 |
| | Assemble Slide Show, Speaker Notes and Handouts of Slides Using Presentation Software | 218 |
| | Open/Retrieve Stored Database; Rename, Insert, Move and Delete Fields; Use Queries and Generate Report; Customize Report (Add Title, Graphics, Functions) | 220 |
| | Retrieve Spreadsheets, Copy Data from One Spreadsheet to Another, Link Spreadsheets, Edit Data in a Linked Spreadsheet, Print and Store Spreadsheets | 222 |
| | Create Graphs and Charts from Spreadsheets | 224 |
| | Import Graphics, Spreadsheets, Text and Data into Word Processing Documents | 226 |

## PERFORMANCE SKILL LEVELS

| ORGANIZATION AND PLANNING | LEVELS 1 | 2 | 3 |
|---|---|---|---|
| Organize and Prioritize Own Work | ● | ● | ● |
| Take Notes for Office Use | ● | ● | ● |
| Maintain Tickler/Follow-Up File | ● | ● | ● |
| Maintain Appointment Calendar (Hard Copy and on Computer) | | | ● |
| Plan/Arrange On-Site Meetings | | | ● |
| Determine Distribution of Materials | ● | ● | ● |
| Maintain Supervisor's Photographs and Biographical Data | | | ● |
| Write Supervisor's Biographical Information | | | ● |
| Make Domestic Travel Arrangements and Prepare Itinerary | | | ● |
| Make International Travel Arrangements for Supervisor and Prepare Itinerary | | | ● |
| Arrange One-Day, Off-Site Conference | | | ● |
| Arrange Three-Day, Off-Site Conference | | | ● |
| Determine and Recommend Best Printer for Reproduction of Printed Materials | | | ● |
| Plan for Entertainment, Receptions or Dinners | | | ● |
| Make Transportation, Lodging and Entertainment Arrangements for Guests | | | ● |
| Explain and/or Demonstrate Basic Office Procedures and Equipment | ● | ● | ● |
| Compose Written Office Procedures | | | ● |
| Delegate Work to Others | ● | ● | ● |
| Improve Office Procedures through Team Concept | ● | ● | ● |
| Prepare Information for Developing Liaisons with Professional Organizations, Businesses and Community Groups | | | ● |
| Plan and Recommend Physical Layout of the Office | | | ● |

| MAINTENANCE OF EQUIPMENT AND SUPPLIES | | | |
|---|---|---|---|
| Order and Maintain Inventory of Equipment and Supplies | ● | ● | ● |
| Maintain Inventory of Office Supplies | ● | ● | ● |
| Maintain Inventory of Office Equipment and Supplies | ● | ● | ● |
| Maintain Inventory of Forms | ● | ● | ● |
| Perform Routine Maintenance on Office Equipment (Change Toner/Ink Jet Cartridge/Ribbon, Clear Paper Jams, Clean Monitor, etc.) | ● | ● | ● |
| Maintain Inventory of Software | | | ● |
| Determine Maintenance of Office Equipment | | ● | ● |
| Determine Dates/Times for Installation of Office Equipment and Furniture | | | ● |

*(Continued)*

## PERFORMANCE SKILL LEVELS

| | LEVELS | | |
|---|---|---|---|
| **MAINTENANCE OF EQUIPMENT AND SUPPLIES** *(Continued)* | 1 | 2 | 3 |
| Prepare Recommendation for Purchase or Lease of Office Equipment | | | • |
| Maintain Inventory Records of Office Equipment and Furniture | | | • |
| Prepare Recommendation for the Purchase of Software | | | • |
| **MEDICAL OFFICE ACTIVITIES** | | | |
| Schedule Appointments, Hospital Admissions, Ancillary Testing, Outpatient Surgery or Referrals to Other Physicians for Patients over the Phone | • | | • |
| Prepare Daily Schedule of Appointments | • | | • |
| Explain Schedule Changes to Visitors, Patients or Clients | • | | • |
| Receive and Store Medical Supplies (Does Not Include Prescription Medications) | • | | • |
| Maintain Reception Room (May Include Maintaining Bulletin Board | • | | • |
| Review Technical Journals for Articles of Interest | | • | • |
| Make Entries in Communication Log | • | • | • |
| **MEDICAL DICTATION/TRANSCRIPTION DUTIES** | | | |
| Take General/Medical Verbatim Dictation Directly Using Shorthand or Speedwriting | | | • |
| Take General/Medical Dictation Directly at the Computer Using Word Processing | | • | • |
| Transcribe Medical Documents (Including Referral Letters, Initial Evaluations/Histories/Physicals, Chart/ Progress/Clinic Notes and Consultations) | | • | • |
| **PREPARATION OF MEDICAL RECORDS AND INSURANCE FORMS** | | | |
| Assist New and Established Patients to Complete Registration Process | • | | • |
| Select and Insert on Patient's Medical Record Entry-Level/Basic Coding Appropriate to Physician's Office, Medical Facility or Clinic Setting But Not Hospitals | | • | • |
| Review Medical Records for Completeness and Accuracy | • | • | • |
| Complete Third-Party-Payer Forms Such as Medicare Payment Request Forms, Medicaid Claim Forms, Commercial Insurance Claim Forms and Managed Care (HMO) Forms | • | | • |
| Complete Birth Certificate Worksheet | • | | |

## PERFORMANCE SKILL LEVELS

| | LEVELS | | |
|---|---|---|---|
| **FINANCIAL FUNCTIONS** | 1 | 2 | 3 |
| Collect and Process Fees | • | | • |
| Issue Receipts for Cash and Reconcile Cash Count and Receipts | • | | • |
| Inspect Invoices for Accuracy | • | | • |
| Complete Vouchers for Payment | | | • |
| Prepare Checks and Maintain Checkbook Balance | • | | • |
| Prepare Bank Deposits | | | • |
| Reconcile Bank Statements | | | • |
| Prepare and Post Checkbook Records | | | • |
| Prepare Employer's Travel Voucher | | | • |
| Keep Record of Office Expenses | | | • |
| Categorize Expenses and Prepare Expense Reports | | | • |
| Make Journal Entries and Prepare Balance Sheet | | | • |
| Reconcile Accounting Journal | | | • |
| Maintain Income and Expense Records | | | • |
| Prepare Office Payroll | | | • |
| Prepare Appropriate Tax Withholding Reports | | | • |
| Prepare and Post Petty Cash Vouchers | • | | • |
| **MANAGEMENT OF RECORDS AND FILES** | | | |
| Prepare and Maintain Filing System | • | • | • |
| Retrieve Information from Hard-Copy Files and Complete Log-Out Card | • | • | • |
| Maintain Magnetic Media File | • | • | • |
| Secure/Maintain Classified/Restricted Access of Confidential/Impounded Files | • | • | • |
| Maintain File of Addresses and Telephone Numbers | • | • | • |
| Transfer and Store Files | • | • | • |
| Maintain Clippings File | | | • |
| **MAIL HANDLING** | | | |
| Process Mail through Postage Meter | • | • | • |
| Determine Best Method of Mailing Services and Process Outgoing Domestic Mail | • | • | • |
| Transmit and Receive Messages Electronically | • | • | • |
| Send Out Goodwill Cards | • | | • |
| Process Incoming Mail | • | • | • |
| Process Outgoing Mail | | • | • |
| Prepare Packages for Shipping | • | • | • |
| Maintain Mailing List on Computer | • | • | • |

## PERFORMANCE SKILL LEVELS

| | LEVELS | | |
|---|---|---|---|
| **BASIC OFFICE OPERATIONS** | 1 | 2 | 3 |
| Greet Patients and/or Visitors | ● | ● | ● |
| Process Basic Incoming and Outgoing Telephone Calls | ● | | ● |
| Process Advanced Incoming and Outgoing Telephone Calls | | | ● |
| Obtain Notarization on Documents | ● | ● | ● |
| Locate and Retrieve Information from Hard Copy | ● | ● | ● |
| Search Informational Sources | ● | ● | ● |
| Maintain Personnel Files on Office Employees | | | ● |
| Maintain Employees' Attendance/Time Sheets and Vacation Records | | | ● |
| Prepare, Compose and Answer Routine Correspondence | | ● | ● |
| Take Minutes at Formal and Informal Meetings | | ● | ● |
| **INFORMATION PROCESSING ACTIVITIES** | | | |
| Key, Process, Print and Store Text and Data Information Using Integrated Software | ● | ● | ● |
| Create and Use Macros and Styles to Save Time | ● | ● | ● |
| Troubleshoot Basic Computer Malfunctions | ● | ● | ● |
| **WORD PROCESSING** | | | |
| Key, Print and Store Formal and Informal Meeting Minutes from Legible Longhand or Edited Rough Draft | ● | ● | ● |
| Key, Print and Store News Releases from Legible Longhand or Edited Rough Draft | ● | ● | ● |
| Key, Print and Store Agendas from Legible Longhand or Edited Rough Draft | ● | ● | ● |
| Key, Print and Store Glossary Files from Legible Longhand or Edited Rough Draft | | ● | ● |
| Key, Print and Store Correspondence (Letters and Memos) from Legible Longhand or Edited Rough Draft | ● | ● | ● |
| Key, Print and Store Business Reports and Manuscripts from Legible Longhand or Edited Rough Draft | ● | ● | ● |
| Open Existing Documents and Revise, Print and Store New Documents from the Existing Documents Using "Save" or "Save As" | ● | ● | ● |
| Merge (from Existing Files) and Print Correspondence (Form Letters) | ● | ● | ● |
| Key, Print and Store Mailing Labels | ● | ● | ● |

## PERFORMANCE SKILL LEVELS

| | | LEVELS | | |
|---|---|---|---|---|
| **MACHINE TRANSCRIPTION** | | 1 | 2 | 3 |
| | Key, Print and Store Formal and Informal Meeting Minutes from Machine Transcription | | • | • |
| | Key, Print and Store News Releases from Machine Transcription | | • | • |
| | Key, Print and Store Agendas from Machine Transcription | | • | • |
| | Key, Print and Store Correspondence (Letters and Memos) from Machine Transcription | | • | • |
| | Key, Print and Store Business Reports and Manuscripts from Machine Transcription | | • | • |
| **BASIC DATA PROCESSING** | | | | |
| | Input, Update and Store Data into Records in an Existing Database | • | • | • |
| | Open Stored Spreadsheet, Input and Update Data into Spreadsheet, Store Revised Spreadsheet and Print Revised Spreadsheet | • | • | • |
| **COMPUTER FILE MANIPULATION** | | | | |
| | Create Data Directory and Subdirectories/Folders and Place Files in Subdirectories/Folders. Copy, Rename, Move, and Delete Files. Copy a Disk. | • | • | • |
| | Make Backup Disks/Files of a Data Directory or Subdirectory/Folder and Delete Data from Backup Disks/Files | • | • | • |
| **DOCUMENT PROCESSING** | | | | |
| | Key, Print and Store Merge Documents (Form Letters, Mailing Labels and Envelopes) | | • | • |
| | Scan Documents onto a Formatted Storage Medium and Import into a Word Processing Program | • | • | • |
| | Locate and Retrieve Information from a Variety of Electronic Sources | • | • | • |
| | Prepare, Place and Send Information on the Internet | | | • |
| | Key, Print and Store Transparency Masters for Presentation from Legible Longhand or Edited Rough Draft Using Presentation Software | | | • |
| **DATABASE AND SPREADSHEET OPERATIONS** | | | | |
| | Plan and Create Database, Input and Update Data into Records, Store Database and Print Quick Reports from Database | | | • |
| | Create Spreadsheet, Input Data into Spreadsheet, Update Data in Spreadsheet and Store Spreadsheet | | | • |

| COMPUTER APPLICATIONS | LEVELS 1 | 2 | 3 |
|---|---|---|---|
| Create and Update Documents Using Desktop Publishing Features of a Word Processing Package or Desktop Publishing Software Package | | | • |
| Assemble Slide Show, Speaker Notes and Handouts of Slides Using Presentation Software | | | • |
| Open/Retrieve Stored Database; Rename, Insert, Move and Delete Fields; Use Queries and Generate Report; Customize Report (Add Title, Graphics, Functions) | | | • |
| Retrieve Spreadsheets, Copy Data from One Spreadsheet to Another, Link Spreadsheets, Edit Data in a Linked Spreadsheet, Print and Store Spreadsheets | | | • |
| Create Graphs and Charts from Spreadsheets | | | • |
| Import Graphics, Spreadsheets, Text and Data into Word Processing Documents | | | • |

# ORGANIZE AND PRIORITIZE OWN WORK.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of tasks to be accomplished
Deadlines for each task
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes work organization information
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

List of tasks to be accomplished and deadlines for each task put in priority order with most urgent deadlines first

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Put tasks to be accomplished in priority order based on deadlines.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of tasks to be accomplished.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of tasks to be accomplished.

10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Note pad and pen
Cassette tape with five minutes of information from which to take notes
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on taking notes

### WORK TO BE PERFORMED

Take notes from the cassette tape.

### PERFORMANCE CRITERIA

Ten minutes will be given to complete the project.

The notes will be error free when submitted for evaluation.

******This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Listen to cassette tape and take notes making sure to include who should receive the information, who the information is from, time of the message and any other relevant information.
3. Play the cassette tape a second time to be sure all of the information is correct. (This will take the place of repeating the information back to the caller to check for accuracy.)

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Tickler file folders labeled by date with a content log sheet stapled to the front of each one
Ten documents to be filed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining tickler files

### WORK TO BE PERFORMED

File the 10 documents in the appropriate tickler/follow-up files.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the project.

The file folders containing the filed documents will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions and the file folder labels.
2. Divide the information into groups to be filed together.
3. Record the documents on the appropriate document log sheet.
4. Place the information in the appropriate file folders following company filing procedures.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN APPOINTMENT CALENDAR (HARD COPY AND ON COMPUTER).



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Legible list of appointments, cancellations and rescheduling to be completed
Appointment book
Calendar software program
Computer
Printer
Office reference manual that includes instructions for making appointments
Instruction manual for calendar software
Equipment/software manuals
Paper
Pen or pencil

### WORK TO BE PERFORMED

Maintain appointment calendar in appointment book and on calendar software.

Schedule appointments.

Cancel and reschedule appointments.

Input the list of 20 appointments and changes into an appointment book and electronic calendar. The appointments must not overlap, and the appropriate amount of time must be allotted for each appointment.

Print a copy of the electronic calendar.

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the project.

The appointment book and electronic calendar will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review list of appointments.

3. Write appointments in the appointment book.
4. Proofread and compare appointment book with list of appointments.
5. Input appointments into electronic calendar.
6. Print electronic calendar.
7. Proofread and edit hard copy of calendar using proofreader's symbols to indicate changes.
8. Input corrections to calendar (use insert, delete, move, copy and search and replace commands as needed).
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Store/Save electronic calendar.
11. Print electronic calendar.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PLAN/ARRANGE ON-SITE MEETINGS.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Meeting room schedules
Calendars of 12 meeting participants
Calendar
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on planning/arranging meetings
Agenda items with time limits for each item specified
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Agenda (one-page) for meeting including time, date and location in accordance with instructions
List of steps for planning the meeting

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The agenda will be input in an acceptable format and be error free when submitted for evaluation.

The steps for planning the meeting will be input in an acceptable format and be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Check calendars of meeting participants.
4. Check availability of meeting rooms.

5. Reserve meeting room.
6. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
7. Prepare draft copy of agenda.
8. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
9. Input corrections as needed.
10. Repeat steps 8 and 9 until all errors have been found and corrected.
11. Prepare final, mailable version of agenda.
12. Set up format (margins spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.)
13. Make a list of items/supplies/equipment needed for the meeting.
14. Make a "to do" list of steps for planning the meeting.
15. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
16. Input corrections as needed.
17. Repeat steps 15 and 16 until all errors have been found and corrected.
18. Store/Save documents.
19. Print documents.
20. Remove diskette from disk drive. Label and file diskette (if applicable).
21. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Copy machine
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on distribution of materials
Names and addresses of 12 committee members
Committee meeting agenda stored on disk
Equipment/software manuals

### WORK TO BE PERFORMED

Retrieve and print the committee meeting agenda in final form.

Make one copy of the agenda for each committee member.

Decide the best way to distribute the agenda to each committee member, and divide the agendas into two stacks (interoffice mail and post office mail).

Make a list of committee members who will receive the agenda through interoffice mail and those who will receive the agenda through post office mail.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The lists and agenda will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on copy machine and check paper.
2. Review instructions.
3. Retrieve meeting agenda from computer.
4. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
5. Input corrections as needed.

6. Repeat steps 4 and 5 until all errors have been found and corrected.
7. Prepare final, mailable version of agenda.
8. Store/Save document.
9. Print document.
10. Remove diskette from disk drive. Label and file diskette (if applicable).
11. Log off of computer (if applicable).
12. Using the list of committee members, make a copy of the agenda for each committee member.
13. Determine how to best distribute the agendas using the addresses given in the committee member list (post office mail or interoffice mail).
14. Divide the agendas into two stacks (interoffice mail and post office mail).
15. Make a list of committee members who will receive the agenda through interoffice mail and those who will receive the agenda through post office mail.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN SUPERVISOR'S PHOTOGRAPHS AND BIOGRAPHICAL DATA.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Supervisor's previous biographical data file and photograph
Current photograph of supervisor
Supervisor's updated resume which includes current educational background, career accomplishments and other relevant information
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining biographical data
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

List of supervisor's current educational background, career accomplishments, honors and/or awards, family or other relevant information (if desired)

Replace the previous information in the supervisor's file with the updated photograph and biographical data.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The biographical information will be input in an acceptable format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).

4. Prepare draft copies of each area of biographical data.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final version of each area of biographical data.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).
13. Replace previous information in the supervisor's file with the current photograph and biographical data so it is available as needed.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# WRITE SUPERVISOR'S BIOGRAPHICAL INFORMATION.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Supervisor's current biographical data file and photographs
Supervisor's resume which includes educational background, career accomplishments, honors and/or awards and family or other relevant information
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on writing biographical data
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Summary of supervisor's biographical information including current educational background, career accomplishments, honors and/or awards and family or other relevant information (if desired).

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the project.

The biographical information will be input in an acceptable format and be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of supervisor's biographical data summary.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.

6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final version of supervisor's biographical data summary.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAKE DOMESTIC TRAVEL ARRANGEMENTS AND PREPARE ITINERARY.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Travel information (list of dates, times, places, airline schedules, hotels, confirmation numbers, etc.)
Travel preferences
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on making travel arrangements and preparing itineraries
Equipment/software manuals

### WORK TO BE PERFORMED

**Make travel arrangements and prepare, print and store itineraries for the following:**

Two-day domestic meeting (overnight)
Three-day domestic conference (air travel)

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The two trips will be planned and entered in itinerary format.

The itineraries will be error free when printed.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions and travel preferences from originator.
3. Plan each trip including lodging, air transportation and ground transportation using travel information provided.

4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.) for itinerary.
5. Keyboard the itinerary for the two-day domestic meeting (overnight) and save frequently if itinerary is lengthy.
6. Run spell check.
7. Proofread itinerary while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Print itinerary.
9. Proofread and edit hard copy of itinerary using proofreader's symbols to indicate changes.
10. Input corrections to itinerary (use insert, delete, move, copy and search and replace commands).
11. Repeat steps 8 - 10 until all errors have been found and corrected.
12. Store/Save document.
13. Print itinerary.
14. Repeat steps 4 - 13 for preparing an itinerary for a three-day domestic conference (air travel).
15. Remove diskette from disk drive. Label and file diskette (if applicable).
16. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAKE INTERNATIONAL TRAVEL ARRANGEMENTS FOR SUPERVISOR AND PREPARE ITINERARY.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Travel information (list of dates, times, places, airline schedules, hotels, confirmation numbers, etc.)
Supervisor's travel preferences (airlines, hotels, etc.)
Company guidelines for international travel arrangements
Background information about the country to be visited
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on making international travel arrangements and preparing itineraries
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents after making travel arrangements:**

Itinerary for the international travel including all travel arrangements and confirmation information
List of needed documentation such as passport and visa, amount of currency to be provided and credit arrangements for the trip
Summary of local customs and practices

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The trip must be planned, put into itinerary format and be error free when printed.

The list of needed documentation and the summary of local customs and practices will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and supervisor's travel preferences.
3. Plan the trip and make the appropriate travel arrangements including lodging, air transportation and ground transportation using travel information provided.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.) for itinerary.
5. Prepare draft copy of itinerary.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of itinerary.
10. Make a list of needed documentation for the trip, amount of currency to be provided and credit arrangements.
11. Summarize the data on local customs and practices which will be beneficial to supervisor.
12. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
13. Input corrections as needed.
14. Repeat steps 12 and 13 until all errors have been found and corrected.
15. Prepare final version of documents prepared in steps 10 and 11.
16. Store/Save documents prepared in steps 10 and 11.
17. Print documents.
18. Remove diskette from disk drive. Label and file diskette (if applicable).
19. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# ARRANGE ONE-DAY, OFF-SITE CONFERENCE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Type of meals/refreshments requested
Approximate number of total conference attendees (25-50)
List of needed equipment and supplies for the two presenters
Required size of meeting room for each presenter
List of preferred conference locations including available equipment and room capacity information
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on conference planning
Agenda items for the one-day conference
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Updated agenda including conference location, list of equipment needed for each presenter and room assignments for each presenter as well as meals needed for meeting
List of steps for planning the off-site conference including publicity and registration for participants

Choose and reserve conference location.

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The agenda, conference location, list of equipment needed, room assignments needed and meal functions needed will be input in an acceptable format and will be error free when printed for evaluation.

The list of steps for planning the off-site conference will be in an acceptable format and will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Check availability and equipment compatibility of preferred conference locations.
4. Reserve the most convenient location.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Prepare draft copy of conference agenda.
7. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 7 and 8 until all errors have been found and corrected.
10. Prepare final, mailable version of conference agenda.
11. Make a list of items/supplies/equipment and meals/refreshments needed for meeting.
12. Make a "to do" list of steps for planning this meeting.
13. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions for steps 11 and 12.
14. Input corrections as needed for steps 11 and 12.
15. Prepare final version of list of items/supplies/equipment and meals/ refreshments needed for meeting and a "to do" list of steps for planning this meeting.
16. Store/Save documents.
17. Print documents.
18. Remove diskette from disk drive. Label and file diskette (if applicable).
19. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Type of meals/refreshments requested
Approximate number of total conference attendees (50-100)
List of needed equipment and supplies for each presenter
Required sizes of meeting rooms for each of the six presenters
List of preferred conference locations which includes available equipment, conference room capacity and hotel room accommodations
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on conference planning
Agenda items for the three-day conference
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Updated agenda including conference location, list of equipment needed for each presenter and room assignments for each presenter as well as meals needed for meeting
List of steps for planning the off-site conference including publicity, hotel accommodations, leisure-time activities and registration procedure for participants

Choose and reserve conference location.

### PERFORMANCE CRITERIA

Two hours* will be given to complete the projects.

The agenda, conference location, list of equipment needed, room assignments needed and meal functions needed will be input in an acceptable format and be error free when printed.

The list of steps for planning the off-site conference will be in an acceptable format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Check availability and equipment compatibility of preferred conference locations.
4. Reserve conference rooms at the most convenient location, and place a hold on the required number of hotel rooms for the conference participants.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Prepare draft copy of conference agenda.
7. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 7 and 8 until all errors have been found and corrected.
10. Prepare final, mailable version of conference agenda.
11. Make a list of items/supplies/equipment and meals/refreshments needed for the conference.
12. Make a "to do" list of steps for planning the conference.
13. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions for steps 11 and 12.
14. Input corrections as needed for steps 11 and 12.
15. Repeat steps 13 and 14 until all errors have been found and corrected.
16. Prepare final version of list of items, supplies/equipment and meals/refreshments needed for this conference and "to do" list of steps for planning this conference.
17. Store/Save documents.
18. Print documents.
19. Remove diskette from disk drive. Label and file diskette (if applicable).
20. Log off of computer (if applicable).

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## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Two-page, color brochure
List of local printers which includes price information for color reproduction, cost per page, as well as time required to accurately complete the job
List of people who are to receive a copy of the brochure
Deadline for mailing the brochures
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on reproduction costs
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Summary of the total cost for reproducing the two-page color brochure from each of the local printers as well as time required by each printer to accurately complete the job

Based on the summary, prepare a brief recommendation and rationale on the printer best suited for this job.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).

4. Prepare draft copy of summary of printer's prices and time required for this job.
5. Based on the summary, prepare a brief recommendation of the best printer for this job.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final versions of summary and recommendation.
10. Store/Save documents.
11. Print documents.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

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## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of reception planning committee members and areas of responsibility
Approximate number of total attendees (100-125)
Budget for facilities, food and entertainment
List of preferred locations including cost and capacity of available rooms
List of local caterers including available menu items and prices
List of preferred entertainment including availability and prices
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on reception planning
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Summary of prices and availability of appropriate facilities, refreshments and entertainment which includes recommendation to supervisor
List of steps for planning the reception identifying the committee member responsible for each aspect

### PERFORMANCE CRITERIA

One hour* will be given to complete the project.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Check prices and availability of preferred reception locations.
4. Check prices and availability of preferred refreshments.
5. Check prices and availability of preferred entertainment.

6. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
7. Prepare a draft copy summarizing the findings from items 3, 4 and 5 and making a recommendation to the supervisor.
8. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
9. Input corrections as needed.
10. Repeat steps 8 and 9 until all errors have been found and corrected.
11. Prepare a final version of the summary.
12. Present recommendation to supervisor for approval.
13. Make a list of items/supplies/equipment and meals/refreshments needed for the reception.
14. Make a "to do" list of steps for planning the reception assigning reception planning committee members specific duties.
15. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
16. Input corrections as needed.
17. Repeat steps 15 and 16 until all errors have been found and corrected.
18. Store/Save documents.
19. Print documents.
20. Remove diskette from disk drive. Label and file diskette (if applicable).
21. Log off of computer (if applicable).

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## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Names and travel preferences for three guests (from same location)
Travel information (list of dates, times, places, airline schedules, confirmation numbers, hotels, etc.)
List of guests' preferred types of entertainment
Company guidelines for guest travel arrangements
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes guest travel arrangement information
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Itineraries for three guests including all travel arrangements, entertainment and confirmation information

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the project.

The trip must be planned and put into itinerary format. The three itineraries will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and guests' travel preferences.
3. Plan the trip including lodging, air transportation, ground transportation and entertainment using travel information provided.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of itineraries.

6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final, mailable version of itineraries.
10. Store/Save documents.
11. Print documents.
12. Mail a copy of the itinerary to each guest one week prior to the trip.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

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## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes routine office procedures
Equipment/software manuals

### WORK TO BE PERFORMED

**Instruct other workers by preparing, printing and storing the following document:**

Instructions to complete a task

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Review the task and prepare draft copy of instructions for other workers to complete the task.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final, presentable version of instructions.
9. Store/Save document.
10. Print document.

11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or video instructions of an office procedure (sending a fax)
Computer
Appropriate software
Printer
Fax machine
Material to be faxed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information about faxing
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Instructions for sending a fax

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of instructions for sending a fax including explanation of major steps, specific objectives to be accomplished and standards of performance expected.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final, presentable version of instructions.

9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of 10 work items to be done and required time to complete each item
Names of two available employees to complete work and their levels of competency
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on delegating work
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

List of 10 work items to be done divided into 2 categories:
Work which can be effectively delegated
Work which should not be delegated

On the list of work to be delegated, note which employees would be best suited to complete the various types of work based on their given skill level and time required to complete each item.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Divide the list of work to be accomplished into two categories: can be delegated and cannot be delegated.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of divided list.

6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. For each task that can be delegated, decide which employee would be best suited to complete the task, and input his or her name next to that task.
10. Prepare final version of divided list with names of employees delegated to various work items.
11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Description of current office procedure that could be improved
List of suggestions from three other office employees on how to improve current office procedure
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on current office procedure
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Improved office procedure based on consensus of suggestions from other office employees

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review other office workers' suggestions for improving current office procedure.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of improved office procedure.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.

7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final version of improved office procedure.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE INFORMATION FOR DEVELOPING LIAISONS WITH PROFESSIONAL ORGANIZATIONS, BUSINESSES AND COMMUNITY GROUPS.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Company description
Descriptions of 10 local professional organizations, businesses and community groups
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on the importance of professional contacts
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

List of described professional organizations, businesses and community groups with which liaisons would be beneficial to your company;
List of reasons why these professional organizations, businesses and community groups would be beneficial.

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the project.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and decide with which professional organizations, businesses and community groups it would be beneficial to have liaisons.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of list of professional organizations, businesses and community groups.

5. Prepare draft copy of why liaisons with these professional organizations, businesses and community groups would be beneficial.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of professional organizations, businesses and community groups list and information concerning the value of these contacts.
10. Store/Save documents.
11. Print documents.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PLAN AND RECOMMEND PHYSICAL LAYOUT OF THE OFFICE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator
Ruler
Drawing of available office floor space including measurements, outlets, phone jacks, etc.
List and measurements of all office furniture
List of safety codes
Office reference manual that includes office layout information with various examples
Pen/Pencil

### WORK TO BE PERFORMED

Using the information available, draw a potential office layout design taking into consideration available floor space, equipment, safety codes and equipment accessibility.

### PERFORMANCE CRITERIA

One hour* will be given to complete the project.

The project will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Prepare draft copy of office layout.
3. Double-check measurements of floor space, equipment, safety standards and equipment accessibility.
4. Prepare final copy of office layout.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Master inventory list of equipment and supplies
List of actual inventory of equipment and supplies
Requisition/order forms for supplies and equipment
Paper
Pen or pencil

### WORK TO BE PERFORMED

Determine the number of each item to be requisitioned/ordered to maintain inventory.

Complete five requisition/order forms.

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The completed inventory report and the five requisition/order forms will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust requisition/order forms.
2. Compare actual inventory with master inventory list and determine quantity of each item to be ordered.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Complete requisition/order forms.
5. Run spell check.
6. Proofread requisition/order forms for correctness of content, format, amonts and totals and input corrections.
7. Print requisition/order forms.

8. Proofread and edit hard copy of requisition/order forms using proofreader's symbols to indicate changes.
9. Input corrections to requisition/order forms (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 8 and 9 until all errors have been found and corrected.
11. Store/Save forms.
12. Print requisition/order forms.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN INVENTORY OF OFFICE SUPPLIES.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator
Computer
Appropriate software
Printer
Sample supply inventory log sheets
List of 20 required office supplies including quantities
List of on-hand office supplies including quantities and locations
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining an inventory
Equipment/software manuals
Pencil

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Design and create a supply inventory log sheet based on the sample inventory form which lists all required office supplies. (Include columns for location, required quantity and quantity on hand.)
Make a list of supplies (and their quantities) that need to be ordered to meet the required quantity.
Input the location and required quantity columns for each item and then fill in the quantity on-hand column for each item in pencil.

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the projects.

The supply inventory log sheet and the listing of supplies to be ordered will be error free when printed for evaluation.

The supply inventory log sheet will include the location and required quantity columns for each item, show the quantity on-hand for each item and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of supply inventory log sheet.
5. Run spell check.
6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of supply inventory log sheet.
10. Fill in the location, required quantity and quantity on-hand columns for each item on the supply inventory log sheet.
11. Make a list of supplies (and their quantities) that need to be ordered to meet the required quantity.
12. Repeat steps 6 and 7 until all errors have been found and corrected.
13. Prepare final version of the listing of supplies.
14. Store/Save documents.
15. Print documents.
16. Remove diskette from disk drive. Label and file diskette (if applicable).
17. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Purchase orders of office equipment and supplies from three different companies
List of office equipment and supplies received including their condition
Office equipment and supply inventory log sheets
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on receiving and storing office equipment and supplies
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

List of equipment and supplies ordered but not received; include name of vendor
List of equipment and supplies received in unsatisfactory condition; include what was wrong with the items and name of vendor

Update equipment and supply inventory log sheet to include items and quantities received.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).

4. Make a list (including vendor's name) of equipment and supplies ordered but not received.
5. Run spell check.
6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of listing of equipment and supplies ordered but not received.
10. Make a list of equipment and supplies received in unsatisfactory condition; include what was wrong with the item and vendor's name.
11. Repeat steps 5 - 7 until all errors have been found and corrected.
12. Prepare final version of the listing of equipment and supplies received.
13. Update equipment and supply inventory log sheet to include items and quantities received in appropriate condition.
14. Repeat steps 5 - 7 until all errors have been found and corrected.
15. Prepare final version of equipment and supply inventory log sheet.
16. Store/Save documents.
17. Print documents.
18. Remove diskette from disk drive. Label and file diskette (if applicable).
19. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN INVENTORY OF FORMS.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator
Typewriter or computer
Appropriate software
Printer
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining an inventory
Completed inventory log sheet showing names of 20 required forms, required quantities of forms and current inventory of forms
Blank requisition form

### WORK TO BE PERFORMED

Complete the inventory log sheet indicating quantity of each form to be ordered.

Complete requisition form indicating name of form and quantity to be ordered.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The inventory log sheet and requisition form will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Complete the inventory log sheet indicating quantity of each form to be ordered.
5. Run spell check.

6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of inventory log sheet showing quantity of forms needed on inventory log sheet.
10. Complete requisition form indicating name of form and number of copies to be ordered.
11. Repeat steps 5 - 7 until all errors have been found and corrected.
12. Prepare final version of requisition form.
13. Store/Save documents.
14. Print documents.
15. Remove diskette from disk drive. Label and file diskette (if applicable).
16. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PERFORM ROUTINE MAINTENANCE ON OFFICE EQUIPMENT (CHANGE TONER/INK JET CARTRIDGE/RIBBON, CLEAR PAPER JAMS, CLEAN MONITOR, ETC.).



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Printer
Equipment manual
Paper
Toner/ink jet cartridge/ribbon
Appropriate tools and cleaning supplies
Pen/pencil

### WORK TO BE PERFORMED

**Perform routine maintenance on office equipment:**

Check cables and connections.
Change toner, ink jet cartridge or ribbon.
Load/change paper in printer.
Clean monitor.
Clear paper jams.
Develop a chronological list of the procedures followed to do each of the listed maintenance activities.

### PERFORMANCE CRITERIA

Thirty minutes to one hour* will be given to complete the projects.

The list of procedures will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn off microcomputer or
   b. Log off computer if using terminal/computer mainframe or minicomputer.
   c. Turn off printer.
2. Review procedures identified in equipment manual to perform functions.
3. Obtain supplies and tools needed to perform routine maintenance.
4. Follow steps in equipment manual.

5. Test equipment to ensure maintenance was done correctly.
6. Repeat steps 2 - 5 if problem has not been corrected.
7. Return tools and extra supplies to storage area.
8. Dispose of or recycle used supplies, if applicable.
9. Clean hands if soiled while performing maintenance.
10. Write list of procedures followed to perform routine maintenance.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of 10 purchased software packages including dates acquired, license number and storage location
List of all software on hand
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining an inventory
Sample inventory form
Equipment/software manuals
Pen/pencil

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Inventory log sheet based on the sample inventory form which lists all current software (including version number) and has columns for license number, date of purchase, storage location and the dates items are inventoried

Fill in the current month and year in the appropriate column and initial each available software item on the inventory.

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the projects.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.

3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of software inventory log sheet.
5. Run spell check.
6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of software inventory log sheet.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).
14. Fill in the current month and year in the appropriate column and initial each inventoried item on the software inventory list.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of five pieces of office equipment and how often they need to be serviced
List of dates when equipment was last serviced
Calendar
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on scheduling maintenance of office equipment
Sample equipment service log sheet
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Equipment service log sheet based on sample log sheet which lists office equipment and approximate dates of required service for the next three years

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Determine dates of required maintenance for each piece of equipment for the next three years.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).

5. Prepare draft copy of equipment service log sheet including all necessary information.
6. Run spell check.
7. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Prepare final version of equipment service log sheet.
11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# DETERMINE DATES/TIMES FOR INSTALLATION OF OFFICE EQUIPMENT AND FURNITURE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Floor plan of office which shows equipment and furniture
List of office furniture and equipment to be installed
Calendar which includes dates and times of office activities
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on scheduling installation of office equipment
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

List of convenient dates and times for equipment and furniture to be installed
List of each piece of equipment and furniture to be installed and installation location

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Using the calendar, determine the least disruptive dates and times for the new furniture and equipment to be installed.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).

5. Make a list of the suggested dates and times for installation.
6. Run spell check.
7. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Prepare final version of the list of suggested dates and times for installation.
11. Using the floor plan, decide where each piece of furniture and equipment should be placed.
12. Make a list of each piece of equipment and furniture to be installed and installation location.
13. Run spell check.
14. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
15. Input corrections as needed.
16. Repeat steps 13 - 15 until all errors have been found and corrected.
17. Prepare final version of the list of each piece of equipment and furniture to be installed and installation location.
18. Store/Save documents.
19. Print documents.
20. Remove diskette from disk drive. Label and file diskette (if applicable).
21. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE RECOMMENDATION FOR PURCHASE OR LEASE OF OFFICE EQUIPMENT.

## MAINTENANCE OF EQUIPMENT AND SUPPLIES

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Established purchasing and leasing procedures
Budget information
Number of copies required per year by company
Information about lease agreement and prices from three different vendors for a new photocopier
Information about purchasing prices and warranties from three different vendors for a new photocopier
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on purchasing/leasing office equipment
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Recommendation to supervisor for purchasing or leasing a new copier based on the material provided which compares costs, benefits and disadvantages to purchasing/leasing the new copier

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Compare costs of purchasing and leasing equipment and identify vendor with the lowest prices.
4. Compare advantages and disadvantages of purchasing or leasing.

5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Prepare draft copy of recommendation which includes cost comparisons and other advantages and disadvantages to purchasing/leasing.
7. Run spell check.
8. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
9. Input corrections as needed.
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Prepare final version of recommendation.
12. Store/Save document.
13. Print document.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN INVENTORY RECORDS OF OFFICE EQUIPMENT AND FURNITURE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of 25 pieces of office furniture and equipment including dates acquired
List of five pieces of missing equipment and office furniture from the above list
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining inventory records
Sample inventory form
Equipment/software manuals
Pen/Pencil

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Inventory log sheet based on the sample inventory form which lists all current equipment and office furniture with dates acquired and has columns to insert and initial the date inventory was completed

Fill in the current month and year in the appropriate column, and initial each inventoried item.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.

3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of inventory log sheet.
5 Run spell check.
6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of inventory log sheet.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).
14. Fill in the current month and year in the appropriate column and initial each inventoried item.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE RECOMMENDATION FOR PURCHASE OF SOFTWARE.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Established purchasing procedures
Budget information
Information about available software from three different companies
List of three software packages requested by employees and how each package would be used
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on purchasing software
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Summary of each software item requested by employees which compares costs and rationale for recommendation to purchase or not purchase each piece of software

### PERFORMANCE CRITERIA

One hour* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review list of requested software.
3. Compare costs of each piece of software, and decide which vendor has the lowest price for each software package.
4. Based on employees' explanations of how software will be used, decide which software will be most useful and will fit into the given budget.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, stylesheet, etc.).

6. Prepare draft copy of software purchase recommendation which includes all company prices, recommended company and rationale for the recommendation.
7. Run spell check.
8. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
9. Input corrections as needed.
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Prepare final version of software purchase recommendation.
12. Store/Save document.
13. Print document.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# SCHEDULE APPOINTMENTS, HOSPITAL ADMISSIONS, ANCILLARY TESTING, OUTPATIENT SURGERY OR REFERRALS TO OTHER PHYSICIANS FOR PATIENTS OVER THE PHONE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Appointment calendar for the current month
Five appointment cards
Case scenario for each of five patients which includes dates and times the patients are available for an appointment. Each patient needs to be scheduled for one of the following: appointment, hospital admission, ancillary testing, outpatient surgery or referral to another physician.
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on scheduling appointments

### WORK TO BE PERFORMED

Prepare a list of steps to be followed when working with each of the situations.

Complete an appointment card for each one of them.

### PERFORMANCE CRITERIA

Fifty minutes* will be given to complete the project.

The list of steps to be followed and appointment cards will be error free when submitted for evaluation.

**This does not allow for interruptions or telephone delays.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Prepare a list of steps to be followed when dealing with each of the five patients' situations.
3. Review the available dates and times for each of the five patients.
4. Schedule an appointment for each of the five patients by completing an appointment card for them.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE DAILY SCHEDULE OF APPOINTMENTS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Handwritten list of 15 appointments for the day which includes patient name, time of appointment, phone number and purpose of appointment
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing daily schedules
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Schedule of appointments for the day

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of daily schedule of appointments.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final version of daily schedule of appointments.
9. Store/Save document.

10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Daily appointment schedule
Case scenario where the doctor is running 1 1/2 hours late due to an unforeseen event and the schedule must be revised to appease waiting patients as well as patients whose appointments are later in the day
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on dealing with re-scheduling appointments
Equipment/software manuals

### WORK TO BE PERFORMED

Prepare a statement of how to handle this situation.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The statement of how to handle this situation will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of statement for how to handle this situation.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.

8. Prepare final version of statement.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# RECEIVE AND STORE MEDICAL SUPPLIES (DOES NOT INCLUDE PRESCRIPTION MEDICATIONS).

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
List of 10 medical supplies that were received
Descriptions of four available storage areas
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on receiving and storing medical supplies

### WORK TO BE PERFORMED

Indicate the best storage area for each medical supply on the provided list.

### PERFORMANCE CRITERIA

Ten minutes* will be given to complete the project.

The list will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions and patient information.
2. Label the list of medical supplies with the best storage area for each of the supplies.
3. Double-check the work.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN RECEPTION ROOM (MAY INCLUDE MAINTAINING BULLETIN BOARD).

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Printer
Appropriate software
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining reception room

### WORK TO BE PERFORMED

Prepare a list of daily, weekly and monthly duties that would be performed when maintaining a reception room.

Put the list in priority order with the most important duty first.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The list will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare a list of daily, weekly and monthly duties to be performed when maintaining a reception room.
5. Put the list in priority order with the most important duty first.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of list.
10. Store/Save document.

11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# REVIEW TECHNICAL JOURNALS FOR ARTICLES OF INTEREST.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Printer
Appropriate software
Two technical journals
List of five topics of interest
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on reviewing technical journals for articles of interest

### WORK TO BE PERFORMED

Make a list of the journal name, title of the article and page number of articles that match the topics of interest.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The list will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Skim through the magazines and locate articles that might match the topics of interest.
4. Read back through the articles to be sure they fit into one of the desired topics of interest and make a list of those articles.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.

9. Prepare final version of the list.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Communication log sheet
List of 10 entries to be made
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on making entries in communication log

### WORK TO BE PERFORMED

Make 10 entries on the communication log sheet.

### PERFORMANCE CRITERIA

Ten minutes* will be given to complete the project.

The log sheet will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Make entries on the communication log sheet making sure all information is included in the appropriate places.
3. Double check the accuracy of your work.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# TAKE GENERAL/MEDICAL VERBATIM DICTATION DIRECTLY USING SHORTHAND OR SPEEDWRITING.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Printer
Appropriate software
Steno pad and pen
Speaker giving 10 minutes of medical dictation at a minimum of 60 wpm
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on taking and transcribing dictation
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, store and print the following document:**

Transcribed dictation

Take dictation using shorthand or speedwriting.

### PERFORMANCE CRITERIA

One hour* will be given to complete the project.

The transcribed dictation will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Establish required format with speaker.
4. Take dictation from speaker.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Key draft copy of transcribed medical dictation.
7. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.

8. Input corrections as needed.
9. Repeat steps 7 and 8 until all errors have been found and corrected.
10. Prepare final, mailable version of document.
11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# TAKE GENERAL/MEDICAL DICTATION DIRECTLY AT THE COMPUTER USING WORD PROCESSING.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Speaker giving 5 minutes of dictation at approximately 40 wpm
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on taking dictation
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Five minutes of dictation taken directly at the computer

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The document will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Establish with speaker the format for dictation.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Key draft copy verbatim as speaker is dictating.
6. Clarify with speaker unclear instructions.
7. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 7 and 8 until all errors have been found and corrected.
10. Prepare final version of document.

11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# TRANSCRIBE MEDICAL DOCUMENTS (INCLUDING REFERRAL LETTERS, INITIAL EVALUATIONS/HISTORIES/ PHYSICALS, CHART/PROGRESS/CLINIC NOTES AND CONSULTATIONS).



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Tape player
Cassette tape with 55 lines of medical dictation at 65 characters per line
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on transcribing dictation
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Transcribed dictation in the established format

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Take dictation from cassette tape using requested format.
5. Type draft copy of dictation using requested format.

6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as requested.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final, mailable version of document.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Registration form on the computer
Registration information for one new patient and one established patient
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on completing registration process

### WORK TO BE PERFORMED

Complete the registration form on the computer for each of the patients.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The printed registration forms will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Complete the registration form on the computer for each patient.
5. Double-check list to make sure all information is correct.
6. Make any necessary corrections.
7. Store/Save registration forms.
8. Print registration forms.
9. Remove diskette from disk drive. Label and file diskette (if applicable).
10. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# SELECT AND INSERT ON PATIENT'S MEDICAL RECORD ENTRY-LEVEL/BASIC CODING APPROPRIATE TO PHYSICIAN'S OFFICE, MEDICAL FACILITY OR CLINIC SETTING BUT NOT HOSPITALS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Five patients' medical records representing multiple diagnosis:
- New (office visit only)
- Established (office visit only)
- Office procedure
- Hospital procedure
- Consultation

Coding manual(s)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on coding
Pen/pencil

### WORK TO BE PERFORMED

Select all appropriate codes and put on each patient's medical records.

### PERFORMANCE CRITERIA

Thirty to forty-five minutes* will be given to complete the project.

The coding must be 100% accurate.

The medical records will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Select appropriate codes from coding manual(s).
2. Write code(s) in the appropriate space on each patient's medical record.
3. Double-check the accuracy of work and make any necessary corrections.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Five patients' medical records
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on protocol or procedures for reviewing medical records

### WORK TO BE PERFORMED

Review each medical record for completeness and accuracy and make a list of deficiencies.

### PERFORMANCE CRITERIA

Twenty to 45 minutes* will be given to complete the project.

The typed list of deficiencies will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review each medical record for completeness and accuracy.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Type a list of any deficiencies.
5. Double-check the accuracy of the work.
6. Print a copy of the list of deficiencies.
7. Proofread for accuracy, and make any necessary changes.
8. Print final version of the list of deficiencies.
9. Store/Save the list on disk.
10. Remove diskette from disk drive. Label and file diskette (if applicable).
11. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# COMPLETE THIRD-PARTY-PAYER FORMS SUCH AS MEDICARE PAYMENT REQUEST FORMS, MEDICAID CLAIM FORMS, COMMERCIAL INSURANCE CLAIM FORMS AND MANAGED CARE (HMO) FORMS.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Typewriter (more efficient when completing forms)
Two, third-party-payer printed forms (1500 form used for Medicare and commercial Medicaid form)
Required information for form
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on typing forms

### WORK TO BE PERFORMED

Type required information in the appropriate place on the forms.

### PERFORMANCE CRITERIA

Twenty to 40 minutes* will be given to complete the project.

The two completed documents will be error free when submitted for evaluation.

*This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Turn on typewriter.
2. Review instructions.
3. Align form in typewriter.
4. Type specific information on corresponding line for each form.
5. Proofread finished product and correct all errors.
6. Turn off typewriter (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Birth certificate worksheet
New mother (role play)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Vital records handbook that includes information on completing birth certificate worksheet

### WORK TO BE PERFORMED

Interview new mother and complete birth certificate worksheet.

### PERFORMANCE CRITERIA

Fifteen to 30 minutes* will be given to complete the project.

The completed document will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review birth certificate worksheet.
2. Interview new mom and fill in information on corresponding line on the birth certificate worksheet.
3. Read the completed birth certificate worksheet back to the new mom to ensure accuracy and correct all errors.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Calculator
Appropriate software
Printer
Completed encounter forms (paper bill) for five patients
Summary of service fees
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on collecting and processing fees
Equipment/software manuals

### WORK TO BE PERFORMED

Complete (assign fees) encounter forms for the five patients.

Calculate fees including total fees, fees to be collected and fees to be billed.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The encounter forms will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Calculate fees that are due from each patient.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of summary that outlines fees owed by each patient.
6. Run spell check.
7. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final version of summary of fees.

10. Store/Save documents.
11. Print documents.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# ISSUE RECEIPTS FOR CASH AND RECONCILE CASH COUNT AND RECEIPTS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Calculator
Appropriate software
Printer
List of cash and checks previously received (total of 10 items)
Receipt book
List of three payments for which receipts need to be issued
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on issuing receipts and reconciling cash counts and receipts
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Reconciliation form which adds up total amount of cash and checks received and compares to the total amount of receipts issued
List of any discrepancies from total of cash and checks with total of receipts to report to supervisor

Write receipts for the three recently received payments in the receipt book.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Write receipts for the three recently received payments in the receipt book.

4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of reconciliation form.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final, mailable version of reconciliation form.
10. Make a list of any discrepancies for the supervisor.
11. Store/Save documents.
12. Print documents.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# INSPECT INVOICES FOR ACCURACY.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Calculator
Verbal and/or written instructions
Account information for five clients
Five invoices to clients/patients that need to be inspected
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on inspecting invoices for accuracy

### WORK TO BE PERFORMED

Inspect the five invoices for accuracy and mark any corrections that need to be made.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The invoices will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Compare the invoice information to the individual client/patient's account information.
2. Mark any corrections that need to be made on the invoices.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Invoice/bill for three items
Original purchase orders for the three items
Three vouchers for payment (on disk)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on completing vouchers
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare print and store the following documents:**

Voucher for each of the three invoices/bills

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the projects.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Double-check accuracy of invoice/bills and make corrections if necessary.
4. Prepare draft copy of payment vouchers.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final, mailable version of payment vouchers.
9. Store/Save documents.

10. Print documents.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Calculator or computer
Appropriate software
Printer
Checkbook with current balance recorded
List of five check amounts to be issued and two deposits to be recorded for the month
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on writing checks and keeping a checkbook balanced

### WORK TO BE PERFORMED

Write the five checks from the given list, and subtract each check amount from the checkbook balance to show a current balance.

Record the two deposit amounts, and add to the checkbook balance.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the projects.

Checkbook will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Write each check making sure it is filled out appropriately.
3. Record each check or deposit amount.
4. Maintain the checkbook balance as checks are written.
5. A computerized software package may be utilized to prepare checks and maintain a checkbook balance.
6. Follow instructions for the computerized software package which should closely follow steps 1 – 4.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator
Deposit slip
List of cash and coins to be deposited
Four checks to be deposited
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes bank deposit information

### WORK TO BE PERFORMED

Fill out the deposit slip, and make sure all checks are accurately endorsed for deposit.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the projects.

Deposit slip and endorsed checks will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Calculate and fill in cash and coin amounts on deposit slip.
3. Fill in each check amount on deposit slip.
4. Total all currency to be deposited and record it on deposit slip.
5. Properly endorse each check for deposit.
6. Double-check all figures to make sure there are no errors.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator or computer
Appropriate software
Printer
Checkbook log listing beginning balance for the month, all checks issued and deposits made during the month (total of 20 items)
Bank statement for the month
Bank statement reconciliation form
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on reconciling a bank statement

### WORK TO BE PERFORMED

Compare data on bank statement with information recorded in checkbook log by properly filling out the reconciliation form.

Make a list of any outstanding checks and/or deposit amounts.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

Submit error-free bank reconciliation form for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Arrange canceled checks in numerical order.
3. Compare checks with stubs or check register to verify amounts.
4. Check off checks listed as outstanding on prior reconciliation which cleared on the current statement.
5. Check off current checks in checkbook or register which cleared on the current statement.
6. Check off deposits listed as in transit on prior reconciliation which have been recorded on the current statement.
7. Check off current deposits which have been recorded on the current statement.

8. Enter all debit memos, credit memos, bank charges and other adjustments on the checkbook or register and compute new totals.
9. Prepare reconciliation form.
   a. Enter date and account number.
   b. Enter statement ending balance.
   c. List and total deposits not checked off in deposit record.
   d. List and total all outstanding checks not checked off from prior reconciliation and current-month register.
   e. Add b to c and subtract d to compute reconciled balance.
10. Prove reconciliation by adding prior month's reconciled balance to current month checks and charges.
11. A computerized software package may be used for reconciliation of bank statements.
12. Follow instructions for the computerized software package which should closely follow steps 1 – 10.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Checkbook with 10 transactions
Checkbook record sheet which includes columns for name of client, check amount, check number and date check was issued
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing and posting checkbook records

### WORK TO BE PERFORMED

Post checkbook transactions to record sheet.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The checkbook record sheet will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Post checkbook entries to financial record sheet making sure all data are filled in appropriately.
2. Double-check for accuracy.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Organization's policy guide for travel vouchers
Ten receipts from employer's travel
Travel voucher (on disk)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on completing travel vouchers
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Travel voucher including each of the employer's allowable travel items

### PERFORMANCE CRITERIA

Twenty minutes will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and company policy on travel vouchers.
3. Sort receipts into allowable categories.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of travel voucher.
6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and work divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final, mailable version of travel voucher.

10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator or computer
Appropriate software
Printer
List of 20 expenses for a one-month period including items purchased, date purchased and cost of item
Office expense form
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on keeping records of office expenses

### WORK TO BE PERFORMED

Complete the office expense form with the information given making sure expense total is correct.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the project.

The office expense form will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Record all appropriate data for expenses on the office expense form in chronological order.
3. Double-check all figures to ensure total is correct.
4. A computerized software package may be utilized for keeping records of office expenses.
5. Follow instructions for the computerized software package which should closely follow steps 1 – 3.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Legible receipts for three employees (no more than 30 receipts) for business trips
Calculator
Computer
Appropriate software with an expense report template
Printer
Office reference manual that includes sample expense reports
Equipment/software manuals
Paper
Pen or pencil

### WORK TO BE PERFORMED

**Categorize expenses and prepare expense reports:**

Sort receipts into transportation, food, lodging, registration and miscellaneous categories.
Prepare expense reports for three employees.
Input data on expense report form and print copy.

### PERFORMANCE CRITERIA

One hour* will be given to complete the work.

The expense reports will be in correct format and error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review handwritten sheets and sort legible receipts into appropriate categories.
3. Record information on expense reports.
4. Input data into appropriate places on expense reports.
5. Proofread expense reports while still on monitor and input corrections.
6. Print expense reports.

7. Proofread and edit hard copy of expense reports using proofreader's symbols to indicate changes.
8. Input corrections to expense reports (use insert, delete, move, copy and search and replace commands as needed).
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Store/Save expense reports.
11. Print expense reports.
12. Remove diskette from disk drive. Label and file diskette (if appropriate).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator or computer
Appropriate software
Printer
Accounting journal
List of 20 entries to be made
Balance sheet
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on making journal entries
Equipment/software manuals

### WORK TO BE PERFORMED

Record list of entries in the appropriate place in the accounting journal making sure debits equal credits.

Complete the balance sheet.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The accounting journal will be error free when submitted for evaluation.

The balance sheet will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Properly record items in the accounting journal.
3. Double-check that each item was recorded appropriately.
4. Complete the balance sheet making sure debits equal credits.
5. A computer and appropriate software package may be used for making journal entries and preparing a balance sheet.
6. Follow instructions for the computerized software package which should closely follow steps 1 – 4.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator or computer
Appropriate software
Printer
Accounting journal
Computer journal balance printout
Completed accounting journal balance sheet
Computer journal reconciliation form
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on reconciling journal entries
Equipment/software manuals

### WORK TO BE PERFORMED

Complete the computer journal reconciliation form to make sure the computer balance equals the accounting journal balance.

Correct all discrepancies.

Make a list of any discrepancies that were corrected.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

Submit journal reconciliation form with a listing of the corrected discrepancies for evaluation.

The projects will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Properly complete the journal reconciliation form.
3. Double-check the accuracy of all figures.
4. Correct discrepancies.
5. Make a list of discrepancies that were corrected.
6. A computer and appropriate software package may be used for reconciliation of the accounting journal.
7. Follow instructions for the computerized software package which should closely follow steps 1 – 5.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Typewriter or computer
Appropriate software
Printer
Five bills to be recorded
Five incoming checks to be recorded
Income/expense record form
Office reference manual that includes information on maintaining income and expense records
Pen
Equipment/software manuals

### WORK TO BE PERFORMED

Post income and expense data to record sheet.

Prepare a statement of how to process bills and checks.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the project.

The record sheet and statement of how to process bills and checks will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Post income and expense entries to record sheet making sure all data is filled in appropriately.
2. Double-check for accuracy.
3. Prepare a statement of how to process bills and checks according to institution procedures.
4. A computer and appropriate software package may be used for maintaining income and expense records and for preparing a statement of how to process bills and checks according to institution procedures.
5. Follow instructions for the computerized software package which should closely follow steps 1 – 3.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Calculator
Typewriter or computer
Appropriate software
Printer
Hours and pay rate for two office employees during this pay period
Withholding table
Checkbook
Payroll record form
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing office payroll
Pen
Equipment/software manuals

### WORK TO BE PERFORMED

Calculate pay and withholdings for each of the employees.

Write a paycheck to each of the employees.

Complete the payroll record form for this pay period.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the projects.

The checks and record sheet will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Calculate pay and withholdings for each of the employees.
2. Double-check calculations for accuracy.
3. Write a check to each employee for the appropriate amount.
4. Complete the payroll record form for this pay period making sure to fill in all of the appropriate information.
5. Double-check all payroll information.
6. A computerized software package may be used for preparing the office payroll.
7. Follow instructions for the computerized software package which should closely follow steps 1 - 5.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE APPROPRIATE TAX WITHHOLDING REPORTS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer or typewriter
Appropriate software
Printer
Payroll record form which includes tax withholding information for two employees
Tax withholding report form
Office reference manual that includes information on preparing appropriate tax withholding reports
Pen
Equipment/software manuals

### WORK TO BE PERFORMED

Complete tax withholding report form.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the projects.

The tax withholding report will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Complete the tax withholding report form for this pay period making sure to fill in the appropriate information.
2. Double-check the information and make any necessary corrections.
3. A computerized software package may be used for preparing tax withholding reports.
4. Follow instructions for the computerized software package which should closely follow steps 1 and 2.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer or typewriter
Appropriate software
Printer
Five petty cash vouchers
Receipts for five items
Petty cash ledger card
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing and posting petty cash vouchers
Pen/pencil
Equipment/software manuals

### WORK TO BE PERFORMED

Post the amounts of the petty cash vouchers to the ledger card.

Attach receipts to the vouchers.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the projects.

The ledger card and vouchers will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Post the amounts from the vouchers to the ledger card.
2. Attach receipts to the vouchers.
3. Review and check amounts. Total receipts must equal amounts posted to the ledger card.
4. A computerized software package may be used for posting petty cash vouchers.
5. Follow instructions for the computerized software package which should closely follow steps 1 – 3.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

**Performance Test - See the skill standard.**

**Written test on related academics and knowledge needed to complete skill standard.**

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Materials to be filed (25 items)
Answer sheet
File folders
Labels
Filing cabinets or other storage equipment
Computer or typewriter
Appropriate software
Printer
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining filing systems
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare a system to permit easy storage and retrieval of files by setting up the following filing systems:**

Alphabetic filing system
Subject filing system
Numeric filing system

File 25 items in correct order in the correct folder and identified on an answer sheet.

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

A filing system will be set up with at least 4 folders, and 25 items will be filed in the folders.

All 25 documents will be filed in the correct order in the correct folder and identified on an answer sheet.

The answer sheet and file folders will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust labels.
2. Review any special instructions from originator.
3. Identify the type of filing system to be used (alphabetic, numeric, subject).
4. Assemble supplies needed to set up and label file folders.
5. Prepare labels. If done on a computer, use appropriate software. Set up format. Run spell check. Proofread and make corrections as needed. Print, store and save labels.
6. Label file folders.
7. File materials (25 items) in appropriate folders.
8. Check files to ensure items were filed accurately.
9. Identify misfiled items and file correctly.
10. Repeat steps 8 and 9 until all errors have been found and corrected.
11. Prepare an answer sheet showing that the 25 documents were filed in the correct order and in the correct file.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Ten file folders filled with various types of information
Blank log-out card
List of five pieces of information to be retrieved from the files
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on filing

### WORK TO BE PERFORMED ↑

Retrieve the appropriate information from the files completing the log-out card appropriately for each item removed from the files.

### PERFORMANCE CRITERIA ↑

Fifteen minutes* will be given to complete the project.

The completed log-out cards will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Retrieve the information requested on the list from the files.
3. Complete the appropriate information on the log-out card.
4. Double-check that all information has been retrieved and that each item has been properly recorded on the log-out card.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Master list of magnetic media (on disk)
List of six new pieces of magnetic media to be filed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on filing magnetic media
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Updated alphabetized, magnetic media master list which includes the six new items

### PERFORMANCE CRITERIA ↑

Twenty minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Retrieve the magnetic media master list from disk.
4. Add the six new magnetic media items to the master list.
5. Double-check all information for its accuracy and make corrections.
6. Alphabetize the updated magnetic media master list.
7. Store/Save document.
8. Print document.
9. Remove diskette from disk drive. Label and file diskette (if applicable).
10. Log off of computer (if applicable).

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*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# SECURE/MAINTAIN CLASSIFIED/RESTRICTED ACCESS OF CONFIDENTIAL/IMPOUNDED FILES.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of 20 confidential files which includes security level required to view each document
List of five employees and their security levels
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on securing/maintaining classified or confidential files
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

List of the five employees and which files they may access based on their security levels

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Decide which documents each employee may have access to based on his/her security level.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare the list of employees and the documents they may access.
6. Proofread the list for accuracy and make corrections if necessary.

7. Prepare final version of employee security list.
8. Store/Save document.
9. Print document.
10. Remove diskette from disk drive. Label and file diskette (if applicable).
11. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Typewriter or computer
Appropriate software
Printer
Six address cards
Information on six people which includes name, company, address, phone and fax machine numbers
Sample of a completed address card
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on address card maintenance
Equipment/software manuals

### WORK TO BE PERFORMED

Complete address cards for the six people and put the cards in alphabetical order by the person's last name.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the projects.

The completed cards, sorted in alphabetical order, will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on typewriter/computer.
   b. Turn on printer (if needed).
   c. Insert first address card.
2. Review instructions and the sample address card.
3. Type appropriate information on each address card.
4. Double-check information for its accuracy and correct any mistakes.
5. Put the address cards in alphabetical order by the person's last name.
6. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Master list of files including current location (on disk)
List of 10 files to be transferred to a new location
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on transferring and/or discarding files
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Updated list of files which indicates new location of files

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Retrieve master list of files.
4. Update the master list by changing the location of files that have been moved.
5. Double-check the list to make sure all files have been updated correctly and make corrections if necessary.
6. Prepare final version of updated list.
7. Store/Save document.
8. Print document.
9. Remove diskette from disk drive. Label and file diskette (if applicable).
10. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard. .

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Scissors
Pen or pencil
Ten labeled file folders
One magazine and one newspaper
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining clipping files

### WORK TO BE PERFORMED

Cut out articles from magazine and newspaper.

File information in the appropriate file.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the projects.

The file folders containing the clipped information will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions and the file folder label topics.
2. Look through magazine and newspaper and cut out articles on relevant topics making sure to write the name and date of the publication on the article.
3. Look through magazine and newspaper to make sure no relevant articles were missed.
4. Divide the information into groups to be filed together.
5. Place the information in the appropriate file folder following company filing procedures.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Postage meter and scale
Postage rate chart
Fifteen pieces of mail
Office policy for using the postage meter
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on using a postage meter
Equipment manual

### WORK TO BE PERFORMED

**Divide the mail into two stacks:**

Items to be run through postage meter
Items that cannot be run through the postage meter based on company policy

Determine appropriate postage for each item to be run through postage meter.

Run the appropriate pieces of mail through the postage meter.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the projects.

The 15 pieces of mail will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
2. Review instructions and office policy for using the postage meter.
3. Decide which mail, based on company policy, may be run through the postage meter and separate those pieces from the other mail.
4. Determine appropriate postage for each piece of mail to be run through postage meter.
5. Make sure the postage meter is set for the current date and the correct postage.
6. Run the appropriate pieces of mail through the postage meter.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# DETERMINE BEST METHOD OF MAILING SERVICES AND PROCESS OUTGOING DOMESTIC MAIL.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Reference books with information about different types of mail services
Four pieces of outgoing mail with required delivery time and date
Selection of mailing materials (envelopes, special mailing folders and boxes, labels, multi-part mailing labels, etc.)
ZIP Code directory
Equipment (computer and printer) to prepare labels or envelopes
Appropriate software
Paper
Pen or pencil
Equipment/software manuals

### WORK TO BE PERFORMED

**Process mail:**

Determine the best way to send each piece of mail such as same day, overnight, second day, registered, certified, return receipt requested, etc., and give reasons in writing for the selection.

Prepare each piece of mail for mailing using appropriate mailing materials.

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the work.

Each piece of mail should have no typographical errors and be in the correct format and style.

The four pieces of mail and written reasons for their selection will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review mail instructions and mail to be processed.

3. Determine best way to send each piece of mail.
4. Prepare each piece of mail according to best way.
   a. Type appropriate labels or envelopes for outgoing mail.
   b. Proofread for errors in typing or format.
   c. Correct errors.
   d. Fold letters and insert in mailers.
5. Prepare written reasons for selection of each mailing service.
6. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Message to be faxed
E-mail message in computer in-box
E-mail address of person to send message to
Equipment (fax machine, telephone)
Instruction book for fax machine and e-mail system
Paper
Pen or pencil
Equipment/software manuals

### WORK TO BE PERFORMED

Send a short e-mail message.

Receive an e-mail message and print a copy.

Send a fax (two pages).

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the work.

An error-free printout of both e-mail messages and a transmission slip for fax, if available, will be submitted for evaluation.

**This does not allow for interruptions or delays.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on fax machine.
2. Key in e-mail message.
3. Print a hard copy of message.
4. Send e-mail message.
5. Read e-mail message from in-box.

6. Print copy of message.
7. Send fax.
8. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# SEND OUT GOODWILL CARDS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following materials:**

Verbal and/or written instructions
Standard operating procedure for sending out goodwill cards
List of five names, addresses and the occasion
Various types of cards (birthday, congratulations, sympathy, etc.)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on sending out goodwill cards

### WORK TO BE PERFORMED

Address envelopes to the five recipients and insert the signed cards in the envelopes.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the project.

The cards will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Select the appropriate card for each recipient.
3. Sign each card with the business name.
4. Address an envelope to each of the five recipients.
5. Insert the cards in the correct envelopes.
6. Double-check for accuracy.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Office procedure for sorting and delivering mail
Twenty-five pieces of mail to be sorted
Date stamp for mail
Calendar
Folders for sorting incoming mail
Mail log to record incoming mail
Pen/pencil
Equipment/software manuals

### WORK TO BE PERFORMED

Sort the 25 pieces of mail into appropriate categories.

Process the 25 pieces of incoming mail by stamping date, sorting by importance, indicating important content, noting missing enclosures, indicating conflicts with dates or times, and noting or attaching background materials.

Record the mail in the mail log.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the project.

The stacks of mail will be error free when examined for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions and office procedure for sorting mail.
2. Examine each piece of mail and sort according to company policy.
3. Date-stamp mail.
4. Separate mail by importance.
5. Indicate important content on mail.
6. Note any missing enclosures.
7. Note any conflicts with dates or times indicated.
8. Note or attach any background materials.
9. Record mail in the mail log.
10. Double-check the accuracy of the work.
11. A computer and appropriate software package may be used for recording mail in the mail log.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Office procedure for processing outgoing mail
Twenty letters addressed to individuals
Twenty addressed labels to correspond with letters
Twenty envelopes
Paper
Pen/pencil

### WORK TO BE PERFORMED

Process the 20 pieces of outgoing mail.

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the project.

The outgoing mail will be error free when examined for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions and office procedure for processing outgoing mail.
2. Attach pre-addressed labels to envelopes for outgoing mail.
3. Examine each piece of outgoing mail, double-checking for accuracy and signature.
4. Mark corrections and/or sign letters as appropriate.
5. Fold letters properly and insert in appropriate envelopes.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
One overnight service envelope with mailing slip
Information as to the sender, receiver and time package needs to arrive
Instructions for completing the mailing slip
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing packages for shipping

### WORK TO BE PERFORMED

Complete the mailing slip.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the project.

The mailing slip will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions for completing the mailing slip.
2. Fill in the appropriate information on the mailing slip.
3. Double-check for accuracy of information.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Mailing list on disk
List of 10 new patients to be added to list
List of 10 patients to be deleted from list
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on maintaining mailing list
Equipment/software manuals

### WORK TO BE PERFORMED

Using a computer, add new patients to the mailing list and delete those patients who are no longer clients.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The updated mailing list will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Retrieve the mailing list from the disk.
4. Add the new patients in the appropriate alphabetical spot.
5. Delete the patients who are no longer clients from the list.
6. Double-check the accuracy of the work.
7. Print a copy of the updated list.
8. Save the updated list on disk.
9. Log off of the computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Prospective patients to greet (role play)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on greeting patients and/or visitors

### WORK TO BE PERFORMED

Greet the prospective patient.

### PERFORMANCE CRITERIA

Five minutes* will be given to complete the project.

The greeting will be done in an appropriate/acceptable manner.

The greeting will be evaluated.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Decide which type of greeting would be most appropriate for the prospective patient.
2. Greet the patient.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Telephone or simulated telephone equipment
Phone directory
Phone message pads
Pen or pencil

### WORK TO BE PERFORMED

**Process telephone calls:**

Plan and place outgoing telephone call.
Process incoming telephone call.

### PERFORMANCE CRITERIA

Ten minutes* will be given to complete the phone calls.

The calls will be processed using appropriate telephone techniques. The phone message must be complete and accurate. The outgoing call (including looking up the number) will be planned (in writing) and a message slip completed for the incoming call. The two documents must be complete, accurate and legible.

These two forms will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Place the telephone (or simulated telephone equipment) or
   b. Plug in a tape recorder and place tape in the machine.
   c. Have notepad and telephone message slips and pen available.
2. Review special instructions for placing the outgoing call.
3. Look up phone number in telephone directory.
4. Plan (in writing) the phone call.
5. Place the phone call.
6. Accurately identify the name and organization of person making the call.
7. Receive an incoming call.
8. Answer incoming call appropriately by accurately identifying organization and person answering telephone.
9. Inform caller of availability of desired party and transfer the call or take a message.

10. Take complete and accurate written message including:
    a. Name of caller
    b. Organization
    c. Phone number
    d. Date and time called
    e. Message
    f. Name of person taking message

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PROCESS ADVANCED INCOMING AND OUTGOING TELEPHONE CALLS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Telephone or simulated telephone equipment
Instruction book for phone
Phone directory
Phone message pads
Paper
Pen or pencil

### WORK TO BE PERFORMED

**Process telephone calls:**

Leave a complete, concise message on voice mail.
Program telephone for speed dialing.
Process incoming telephone calls on a multi-line phone.
Set up conference call/video conference.
Process incoming phone call and visitor that arrive simultaneously.

### PERFORMANCE CRITERIA

Two hours* will be given to complete the activities.

The calls must be processed using appropriate telephone technique.

The voice mail message will be planned and recorded.

A phone will be programmed for speed dialing of three numbers or the steps will be written down to successfully complete that procedure.

A multi-line phone will be answered and a message taken.

A conference call for three people in three different locations will be set up or the steps to successfully complete that procedure written down.

Successful handling of a simultaneous incoming phone call and visitor will be demonstrated through role play or the procedure will be written.

The recording and documents will be error free when submitted for evaluation. The documents will be complete, accurate and legible.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Place the telephone (or simulated telephone equipment) or
   b. Plug in a tape recorder and place tape in the machine.
   c. Have notepad and telephone message slips and pen available.
2. Review instructions for using special telephone features in instruction book.
3. Plan (in writing) the voice mail message.
4. Place the phone call and leave the message.
5. Program a telephone for speed dialing (or write the steps).
6. Answer a multi-line phone.
7. Accurately identify the name and organization of person making the call.
8. Take complete and accurate written message including:
   a. Name of caller
   b. Organization
   c. Phone number
   d. Date and time called
   e. Message
   f. Name of person taking message
9. Set up conference call for three people (or write the steps for successfully completing the procedure).
10. Process incoming phone call and visitor that arrive simultaneously:
    a. Greet visitor.
    b. Answer incoming call appropriately by accurately identifying organization.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Office procedure for obtaining notarization on documents
Ten documents
Equipment/software manuals

### WORK TO BE PERFORMED

Make a list of documents which need to be notarized according to office procedure.

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the project.

The list will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and company procedure for obtaining notarization.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Make a list of documents which require notarization.
5. Run spell check.
6. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of the list of documents which require notarization.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# LOCATE AND RETRIEVE INFORMATION FROM HARD COPY.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Book of reference material
Telephone directory
List of five pieces of information to be retrieved
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on locating and retrieving information

### WORK TO BE PERFORMED

Retrieve the appropriate information and write it down.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the project.

The retrieved information will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Review instructions.
2. Retrieve the information requested on the list from the available reference materials.
3. Write the retrieved information down and note where the information was found.
4. Double-check that all information has been retrieved and that each source has been written down.

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Five requests for information
*AJ Guide to Health Care Field*
Hospital phone book
Available resource center
Equipment/software manuals

### WORK TO BE PERFORMED

Search the informational sources and retrieve the requested information.

Make a list of the information and the source for each request.

### PERFORMANCE CRITERIA

Thirty to 45 minutes* will be given to complete the project.

The list will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Decide what would be the best source of information for each request.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Make a list of the information and source for each request.
6. Run spell check.
7. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Input corrections as needed.
9. Repeat steps 6 – 8 until all errors have been found and corrected.
10. Prepare final version of the list of information and source for each request.

11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN PERSONNEL FILES ON OFFICE EMPLOYEES.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Personnel files for five employees (saved on disk)
List of information to be added to each of the five employees files
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on updating employee files
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Update each of the five employees' files on the disk

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The documents will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and information to be updated.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Prepare draft copy of the updated employee files.
5. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
6. Input corrections as needed.
7. Repeat steps 5 and 6 until all errors have been found and corrected.
8. Prepare final version of the updated employees' files.
9. Store/Save documents.

10. Print documents.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAINTAIN EMPLOYEES' ATTENDANCE/TIME SHEETS AND VACATION RECORDS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software with a time sheet template
Printer
Legible longhand report of hours worked by five employees for two weeks
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes sample time sheet
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Time sheets on the computer for five employees

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the projects.

The time sheets will be in correct format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review handwritten time sheets.
3. Input data into appropriate employee's time sheet.
4. Proofread time sheets while still on monitor and input corrections.
5. Print time sheets.
6. Proofread and edit hard copy of time sheets using proofreader's symbols to indicate changes.
7. Input corrections to time sheets (use insert, delete, move, copy and search and replace commands as needed).
8. Repeat steps 5 - 7 until all errors have been found and corrected.
9. Prepare final version of time sheets.

10. Store/Save time sheets.
11. Print time sheets.
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PREPARE, COMPOSE AND ANSWER ROUTINE CORRESPONDENCE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Routine request needing a reply
Computer
Appropriate software
Printer
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing routine memos and letters
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare and answer routine correspondence by composing, writing, printing and storing the following business documents:**

Routine request
Information letter
Reply to routine request

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The three documents will be input in memo or business letter format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Compose/keyboard the documents. Save frequently if memo or letter is lengthy.
5. Edit documents on screen.
6. Run spell check.

7. Proofread correspondence while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Print correspondence.
9. Proofread and edit hard copy of correspondence using proofreader's symbols to indicate changes.
10. Input corrections to correspondence (use insert, delete, move, copy and search and replace commands).
11. Repeat steps 8 - 10 until all errors have been found and corrected.
12. Store/Save document.
13. Print correspondence.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Video of formal meeting (15 minutes)
Video of informal meeting (15 minutes)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes Robert's Rules of Order
Office reference manual that includes information on taking minutes at a formal and informal meeting
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

The notes from the videos of the formal and informal meetings
Minutes from the formal meeting
Minutes from the informal meeting

Take notes from the videos of the formal and informal meetings.

### PERFORMANCE CRITERIA

Two hours* will be given to complete the projects.

The minutes will be input in an acceptable format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions and Robert's Rules of Order.
3. View the videos from the formal and informal meeting and take notes.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of minutes from each meeting.

6. Run spell check and proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Input corrections as needed.
8. Repeat steps 6 and 7 until all errors have been found and corrected.
9. Prepare final versions of the minutes from each meeting.
10. Store/Save documents.
11. Print documents.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Disk with files (a spreadsheet, a database and a presentation document) stored on it
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing reports with data
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

Two-page report importing files from spreadsheet, database and presentation software

### PERFORMANCE CRITERIA

One hour* will be given to complete the project.

The document must be input in report format and must be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Prepare draft copy of the report importing files from spreadsheet, database and presentation software.
5. Run spell check and proofread document while still on the monitor for correctness of content, format, grammar, punctuation, capitalization and word divisions.

6. Print report.
7. Proofread and edit hard copy of report using proofreader's symbols to indicate changes.
8. Input corrections to report (use insert, delete, move, copy and search and replace commands).
9. Repeat steps 5 - 8 until all errors have been found and corrected.
10. Store/Save document.
11. Print document.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# CREATE AND USE MACROS AND STYLES TO SAVE TIME.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Description of two styles and one macro to be created
Legible copy of letter to be keyed which indicates where the styles and the macro are to be used
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on styles and macros
Equipment/software manuals

### WORK TO BE PERFORMED

**Create and save the following:**

Styles for two types of headings
Macro for letter closing

**Prepare, print and store the following document:**

Letter that uses the two created styles and the macro for the letter closing

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Create and save the two styles.
4. Create and save the macro.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Prepare draft copy of the letter including the styles and the macro in the appropriate places.

7. Run spell check and proofread letter while still on the monitor for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Print letter.
9. Proofread and edit hard copy of letter using proofreader's symbols to indicate changes.
10. Input corrections to letter (use insert, delete, move, copy and search and replace commands).
11. Repeat steps 8 - 10 until all errors have been found and corrected.
12. Store/Save letter.
13. Print letter.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
List of five computer malfunctions to be solved
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on solving computer malfunctions
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following document:**

List of the computer malfunctions and the steps to be followed to solve each malfunction

### PERFORMANCE CRITERIA

One hour* will be given to complete the projects.

The document will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review instructions.
3. Review each computer malfunction to be solved.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. Prepare draft copy of the list of computer malfunctions to be solved and steps to be followed to solve each malfunction.
6. Run spell check and proofread document while still on the monitor for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print document.

8. Proofread and edit hard copy of document using proofreader's symbols to indicate changes.
9. Input corrections to document (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save document.
12. Print document.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE FORMAL AND INFORMAL MEETING MINUTES FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed (five pages)
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing minutes
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

Minutes (one page single-spaced) from a one-hour, informal committee meeting
Minutes (four pages, single-spaced) from a three-hour, formal meeting

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

The two documents will be input in business report format and will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Keyboard the documents. Save frequently if minutes are lengthy.
5. Run spell check.
6. Proofread minutes while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.

7. Print minutes.
8. Proofread and edit hard copy of minutes using proofreader's symbols to indicate changes.
9. Input corrections to minutes (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save minutes.
12. Print minutes.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE NEWS RELEASES FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing news releases
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following business document:**

Three-page, double-spaced news release

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the computer project.

The document will be input in news release format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the document. Save frequently if news release is lengthy.
5. Run spell check.
6. Proofread news release while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print news release.

8. Proofread and edit hard copy of news release using proofreader's symbols to indicate changes.
9. Input corrections to news release (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save news release.
12. Print news release.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE AGENDAS FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing agendas
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

One-page agenda
Four-page agenda

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

The two documents will be input in agenda format using appropriate software features (bold, underline, italics, centering, font sizes) and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the documents. Save frequently if agendas are lengthy.
5. Run spell check.
6. Proofread each agenda while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print each agenda.

8. Proofread and edit hard copy of each agenda using proofreader's symbols to indicate changes.
9. Input corrections to each agenda (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save each agenda.
12. Print each agenda.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE GLOSSARY* FILES FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing glossary files
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following documents:**

Eight glossary* files
A document using some of the glossary files

### PERFORMANCE CRITERIA

One hour** will be given to complete the computer projects.

The eight files will be input in correct format and be error free when printed for evaluation.

An error free document will be created using some of the glossary files.

Each glossary file and the document created from some of the glossary files will be error free when printed for evaluation.

**Glossary files are text or instructions that are frequently used.*

***This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the glossary files. Save frequently if text is lengthy.
5. Run spell check.

6. Proofread glossary files while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print glossary files.
8. Proofread and edit hard copy of glossary files using proofreader's symbols to indicate changes.
9. Input corrections to glossary files (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save glossary files.
12. Print glossary files.
13. Keyboard a document using some of the glossary files.
14. Proofread document while still on monitor, and input corrections. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
15. Print document.
16. Proofread and edit hard copy of document using proofreader's symbols to indicate changes.
17. Input corrections to document (use insert, delete, move, copy and search and replace commands).
18. Repeat steps 15 - 17 until all errors have been found and corrected.
19. Store/Save document.
20. Print document.
21. Remove diskette from disk drive. Label and file diskette (if applicable).
22. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE CORRESPONDENCE (LETTERS AND MEMOS) FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing memos and letters
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following business documents:**

One-half page memo
One-page letter (three paragraphs)
One and one-half page letter with a header on the second page

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The three documents will be input in memo or business letter format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Keyboard the documents. Save frequently if memo or letter is lengthy.
5. Run spell check.
6. Proofread correspondence while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.

7. Print correspondence.
8. Proofread and edit hard copy of correspondence using proofreader's symbols to indicate changes.
9. Input corrections to correspondence (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save documents.
12. Print correspondence.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE BUSINESS REPORTS AND MANUSCRIPTS FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing business reports and manuscripts
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

One-page report
1,500-word manuscript with side headings and page numbering

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

The two documents will be input in business report format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions for the report from the originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Keyboard the report. Save frequently if report is lengthy.
5. Run spell check.
6. Proofread report while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.

7. Print report.
8. Proofread and edit hard copy of report using proofreader's symbols to indicate changes.
9. Input corrections to report (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save report.
12. Print report.
13. Review draft copy and any special instructions for the manuscript from the originator.
14. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
15. Keyboard the manuscript. Save frequently if manuscript is lengthy.
16. Run spell check.
17. Proofread manuscript while still on monitor and input corrections. Proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
18. Print manuscript.
19. Proofread and edit hard copy of manuscript using proofreader's symbols to indicate changes.
20. Input corrections to manuscript (use insert, delete, move, copy and search and replace commands).
21. Repeat steps 18 - 20 until all errors have been found and corrected.
22. Store/Save manuscript.
23. Print manuscript.
24. Remove diskette from disk drive. Label and file diskette (if applicable).
25. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# OPEN EXISTING DOCUMENTS AND REVISE, PRINT AND STORE NEW DOCUMENTS FROM THE EXISTING DOCUMENTS USING "SAVE" OR "SAVE AS."

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Edited hard copy
Existing documents on disk
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing letters and business reports
Equipment/software manuals

### WORK TO BE PERFORMED

**Open documents, make minor revisions, print and store (using "save" or "save as") the following business documents:**

One-page letter (use "save")
Two-page report (use "save as")

### PERFORMANCE CRITERIA

Twenty minutes* will be given to complete the computer projects.

The documents must be revised in correct format utilizing cut, copy, paste, search and replace, etc., where appropriate and be error free when printed for evaluation.

Documents will be stored with "save" or "save as," whichever is appropriate.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review edited copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).

4. Retrieve the existing documents and keyboard the changes. Save frequently if documents are lengthy.
5. Run spell check.
6. Proofread each document while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print each document.
8. Proofread and edit hard copy of each document using proofreader's symbols to indicate changes.
9. Input corrections to documents (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save documents using "save" or "save as," whichever is appropriate.
12. Print documents.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Two files (on disk) to be merged
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that contains information on letter formats
Equipment/software manuals

### WORK TO BE PERFORMED

**Merge (from existing files) and print the following using the merge feature:**

Twelve letters (one page, three paragraphs)

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the computer projects.

The two files with merge codes will be merged and be error free when printed.

The letters will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Merge the two files.
4. Print the letters.
5. Remove diskette from disk drive. Label and file diskette (if applicable).
6. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible list of names and addresses to be keyed
Labels
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that contains USPS (United States Postal Service) regulations for mailing labels
Equipment/software manuals

### WORK TO BE PERFORMED

**Key, print and store 20 mailing addresses. Print the same addresses on both of the following:**

Sheet of two-column labels
Sheet of three-column labels

### PERFORMANCE CRITERIA

Thirty minutes* will be given to complete the computer projects.

The mailing addresses will be input in correct format for labels and be error free when printed.

Both sets of labels will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust labels.
2. Review draft copy of mailing addresses and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, pagination, style sheet, etc.).
4. Keyboard the two-column mailing labels. Save frequently.
5. Run spell check.

6. Proofread addresses while still on monitor and input corrections; proofread for correctness of content, format, punctuation and capitalization.
7. Print two-column mailing labels on plain paper.
8. Proofread and edit hard copy of labels using proofreader's symbols to indicate changes.
9. Input corrections to labels (use insert, delete, move, copy and search and replace commands).
10. Store/Save labels.
11. Print two-column mailing labels.
12. Adjust (change font size, etc.) mailing addresses for three-column mailing labels.
13. Print three-column mailing labels.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE FORMAL AND INFORMAL MEETING MINUTES FROM MACHINE TRANSCRIPTION.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal instructions
Computer
Appropriate software
Printer
Transcribing equipment
Media to be transcribed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing meeting minutes
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

Minutes (one page, single-spaced) from a one-hour, informal committee meeting
Minutes (four pages, single-spaced) from a three-hour, formal meeting

### PERFORMANCE CRITERIA

Two hours* will be given to complete the computer projects.

The two documents will be input in business report format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on transcribing equipment; insert dictation media; put on earphone(s); adjust foot pedal and adjust volume, tone and speed controls.
2. Review dictation to determine format, length of document and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).

4. Keyboard the minutes. Save frequently if minutes are lengthy.
5. Run spell check.
6. Proofread minutes while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print minutes.
8. Proofread and edit hard copy of minutes using proofreader's symbols to indicate changes.
9. Input corrections to minutes (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save minutes.
12. Print minutes.
13. Turn off transcribing equipment, remove dictation media, note that material has been transcribed and file dictation media.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE NEWS RELEASES FROM MACHINE TRANSCRIPTION.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal instructions
Computer
Appropriate software
Printer
Transcribing equipment
Media to be transcribed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing news releases
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following business document:**

Three-page, double-spaced news release

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the computer project.

The document will be input in news release format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on transcribing equipment; insert dictation media; put on earphone(s); adjust foot pedal and adjust volume, tone and speed controls.
2. Review dictation to determine format, length of news release and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the document. Save frequently if news release is lengthy.
5. Run spell check.

6. Proofread news release while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print news release.
8. Proofread and edit hard copy of news release using proofreader's symbols to indicate changes.
9. Input corrections to news release (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save document.
12. Print news release.
13. Turn off transcribing equipment, remove dictation media, note that material has been transcribed and file dictation media.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal instructions
Computer
Appropriate software
Printer
Transcribing equipment
Media to be transcribed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing agendas
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

One-page agenda
Five-page agenda

### PERFORMANCE CRITERIA

Two hours* will be given to complete the computer projects.

The two documents will be input in agenda format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on transcribing equipment; insert dictation media; put on earphone(s); adjust foot pedal and adjust volume, tone and speed controls.
2. Review dictation to determine format, length of document and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the documents. Save frequently if agenda is lengthy.
5. Run spell check.

6. Proofread each agenda while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print each agenda.
8. Proofread and edit hard copy of each agenda using proofreader's symbols to indicate changes.
9. Input corrections to each agenda (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save each agenda.
12. Print each agenda.
13. Turn off transcribing equipment, remove dictation media, note that material has been transcribed and file dictation media.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE CORRESPONDENCE (LETTERS AND MEMOS) FROM MACHINE TRANSCRIPTION.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal instructions
Computer
Appropriate software
Printer
Transcribing equipment
Media to be transcribed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing letters and memos
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following business documents:**

One-half page memo
One-page letter (three paragraphs)
One and one-half page letter with a header on the second page

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The documents will be input in memo or business letter format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on transcribing equipment; insert dictation media; put on earphone(s); adjust foot pedal and adjust volume, tone and speed controls.
2. Review dictation to determine format, length of document and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).

4. Keyboard the documents. Save frequently if correspondence is lengthy.
5. Run spell check.
6. Proofread correspondence while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print correspondence.
8. Proofread and edit hard copy of correspondence using proofreader's symbols to indicate changes.
9. Input corrections to correspondence (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save documents.
12. Print correspondence.
13. Turn off transcribing equipment, remove dictation media, note that material has been transcribed and file dictation media.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE BUSINESS REPORTS AND MANUSCRIPTS FROM MACHINE TRANSCRIPTION.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal instructions
Computer
Appropriate software
Printer
Transcribing equipment
Media to be transcribed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing reports and manuscripts
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following two business documents:**

One-page report
1,500-word manuscript with side headings and page numbering

### PERFORMANCE CRITERIA

Two hours* will be given to complete the computer projects.

The two documents will be input in business report format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on transcribing equipment; insert dictation media; put on earphone(s); adjust foot pedal and adjust volume, tone and speed controls.
2. Review dictation to determine format, length of document and any special instructions for the report from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the report. Save frequently if report is lengthy.
5. Run spell check.

6. Proofread report while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print report.
8. Proofread and edit hard copy of report using proofreader's symbols to indicate changes.
9. Input corrections to report (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save report.
12. Print report.
13. Review dictation to determine format, length of document and any special instructions for the manuscript from the originator.
14. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
15. Keyboard the manuscript. Save frequently if manuscript is lengthy.
16. Run spell check.
17. Proofread manuscript while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
18. Print manuscript.
19. Proofread and edit hard copy of manuscript using proofreader's symbols to indicate changes.
20. Input corrections to manuscript (use insert, delete, move, copy and search and replace commands).
21. Repeat steps 18 - 20 until all errors have been found and corrected.
22. Store/Save manuscript.
23. Print manuscript.
24. Turn off transcribing equipment, remove dictation media, note that material has been transcribed and file dictation media.
25. Remove diskette from disk drive. Label and file diskette (if applicable).
26. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# INPUT, UPDATE AND STORE DATA INTO RECORDS IN AN EXISTING DATABASE.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Appropriate database containing ten records on disk
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing databases
Equipment/software manuals

### WORK TO BE PERFORMED

**Input, update and store the following in records in an existing database:**

Add 30 names and mailing addresses (minimum of 5 fields per record using date, alphabetic and numeric entries).
Add, delete and update data in fields in records in an existing database.

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The 30 records (with a minimum of 5 fields using date, alphabetic and numeric entries) must be input into a database that has been set up and be error free when printed for evaluation.

The original and revised databases will be printed using a prepared quick report format for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Retrieve/open database; insert and delete records and update records as needed.
4. Keyboard the data into appropriate fields or revise the data in the records. Save frequently if database is lengthy.

5. Run spell check, if appropriate.
6. Proofread database while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
7. Print database.
8. Proofread and edit hard copy of database using proofreader's symbols to indicate changes.
9. Input corrections to database (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save document.
12. Print the original and revised databases using a prepared quick report format.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# OPEN STORED SPREADSHEET, INPUT AND UPDATE DATA INTO SPREADSHEET, STORE REVISED SPREADSHEET AND PRINT REVISED SPREADSHEET.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Disk with spreadsheet stored on it
Printed copy of spreadsheet with 20 legible additions and changes to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing spreadsheets
Equipment/software manuals

### WORK TO BE PERFORMED

**Open and update a stored spreadsheet by doing the following:**

Open a one-page (21 rows x 7 columns) spreadsheet.
Add data to cells of spreadsheet from legible rough draft copy.
Update existing data in cells of spreadsheet from legible rough draft.
Store the revised spreadsheet.
Print the spreadsheet.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the computer project.

The 20 changes will be input into a stored spreadsheet and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Retrieve spreadsheet from disk.

4. Keyboard the data into appropriate cells or revise the data in the spreadsheet. Save frequently if spreadsheet is lengthy.
5. Run spell check.
6. Proofread spreadsheet while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
7. Print spreadsheet.
8. Proofread and edit hard copy of spreadsheet using proofreader's symbols to indicate changes.
9. Input corrections to spreadsheet (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save document.
12. Print spreadsheet.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# CREATE DATA DIRECTORY AND SUBDIRECTORIES/ FOLDERS AND PLACE FILES IN SUBDIRECTORIES/ FOLDERS. COPY, RENAME, MOVE AND DELETE FILES. COPY A DISK.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Disk containing 40 files
Blank disk
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on creating data directories and subdirectories/folders; saving files into subdirectories; copying, moving, renaming and deleting files; and copying a disk
Equipment/software manuals

### WORK TO BE PERFORMED

**Print a copy of each subdirectory/folder after the following functions have been performed:**

Create two data directories.
Create three subdirectories/folders in data directory, and place appropriate files in each of these subdirectories/folders.
Copy files, move files from one subdirectory/folder to another, rename files and delete files.
Copy a disk.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the computer project.

The subdirectories/folders will be created and appropriate files moved into them with 100 percent accuracy. Four files will be copied, three files renamed, three files moved and four files deleted with 100 percent accuracy. The contents of each data directory and each subdirectory/folder will be error free when printed for evaluation.

The copied disk will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Create new data directories and subdirectories/folders.
5. Move designated files into appropriate directories/folders.
6. Proofread for accuracy.
7. Print a list of the contents of each data directory and subdirectory/folder.
8. Proofread and edit hard copy of subdirectories using proofreader's symbols to indicate changes.
9. Make corrections to directory/folder names and contents of directory/folder.
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Copy, rename, move and delete designated files.
12. Print a list of the contents of each subdirectory/folder.
13. Copy the disk.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# MAKE BACKUP DISKS/FILES OF A DATA DIRECTORY OR SUBDIRECTORY/FOLDER AND DELETE DATA FROM BACKUP DISKS/FILES.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Source disk containing 40 files
Backup disk
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on making backup disks/files and deleting files from the backup
Equipment/software manuals

### WORK TO BE PERFORMED

Make backup disks/files of a data directory or subdirectory/folder and delete data from backup disks/files.

Make a backup disk from a source disk.

Delete designated files from the backup disk.

### PERFORMANCE CRITERIA

Fifteen minutes* will be given to complete the computer project.

The backup disk will be created and appropriate files deleted with 100 percent accuracy.

The contents of the source disk, the backup disk and the backup disk after files are deleted will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Create backup disk from source disk.
4. Delete designated files from backup disk.
5. Proofread for accuracy.

6. Print a list of the contents of source disk, backup disk and backup disk after designated files are deleted.
7. Proofread and edit hard copy of printouts using proofreader's symbols to indicate changes.
8. Make corrections to disks if necessary.
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Remove diskette from disk drive. Label and file diskette (if applicable).
11. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that contains USPS (United States Postal Service) regulations for mailing labels and addressing envelopes
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following using the merge features:**

Six letters (one page—three paragraphs)
Six envelopes
Six mailing labels (two-column labels)

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the computer projects.

The letters, envelopes and labels will be input in correct format and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper and envelopes/labels.
2. Review draft copy of mailing addresses and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, pagination, style sheet, etc.).
4. Keyboard the form letters and addresses. Save frequently.
5. Run spell check.
6. Proofread addresses while still on monitor and input corrections; proofread for correctness of content, format, punctuation and capitalization.

7. Print letters, envelopes and labels.
8. Proofread and edit hard copy of letters, envelopes and labels using proofreader's symbols to indicate changes.
9. Input corrections to letters and mailing addresses (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 8 and 9 until all errors have been found and corrected.
11. Store/Save documents.
12. Reprint letters, envelopes and/or mailing labels that had corrections.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# SCAN DOCUMENTS ONTO A FORMATTED STORAGE MEDIUM AND IMPORT INTO A WORD PROCESSING PROGRAM.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Documents to be scanned
Scanner
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual containing information on scanning documents
Equipment/software manuals

### WORK TO BE PERFORMED

**Scan the following documents into computer:**

Two-page report
Two pages from a book

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the computer projects.

The two documents will be scanned into a word processing format, retrieved in the word processing program and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
   d. Turn on scanner.
2. Review documents to be scanned and any special instructions from originator.
3. Scan the items.
4. Save in a word processing format.
5. Retrieve/open scanned text in word processing program.
6. Run spell check.
7. Proofread documents while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
8. Print documents.

9. Proofread and edit hard copy of documents using proofreader's symbols to indicate changes.
10. Input corrections to documents (use insert, delete, move, copy and search and replace commands).
11. Repeat steps 8 - 10 until all errors have been found and corrected.
12. Store/Save documents.
13. Print documents.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFOIMANCE

**Given the following equipnent and materials:**

Verbal and/or writteninstructions
Computer with CD-R)M drive
Terminal with access o electronic card catalog
Appropriate software
Printer
Reference books suchas a dictionary, word division manual, punctuation guide and capitalizıtion guide
Office reference manıal that includes information on locating and retrieving informaton from a variety of electronic sources
Equipment/software nanuals

### WORK TO BE PERFORMED

**Locate and retrieve information from the following electronic sources:**

Electronic card catalog
CD-ROM
On-line
Cyberspace (Internet or wide area network)

### PERFORMANCE CRITERA

One hour* will be given to locate, retrieve and document (in writing) one item from each of the sources listed above.

The written documentation will be error free when submitted for evaluation.

**This does not allow for interruptions or delays.*

## PERFORMANCE ELEMENTS ANDASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Locate the requested information in each of the sources.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. At the keyboard, compose draft of written documentation of located information.
6. Run spell check.

7. Edit and proofread the draft while it is still on the monitor.
8. Repeat step 7 until all errors have been found and corrected.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer with Internet access
Appropriate software
Printer
Information to be placed and sent on Internet
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing, placing and sending information on the Internet
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, place and send information on the Internet:**

Send information about a product or service.
Order a book.

### PERFORMANCE CRITERIA

One hour* will be given to prepare, place and send information on the Internet and document (in writing) the steps followed to accomplish the task.

The written documentation will be error free when submitted for evaluation.

**This does not allow for interruptions or delays.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Prepare the information to be placed and sent via Internet.
4. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
5. At the keyboard, compose draft of written documentation of information prepared and sent.
6. Run spell check.
7. Edit and proofread the draft while it is still on the monitor.

8. Repeat step 7 until all errors have been found and corrected.
9. Store/Save document.
10. Print document.
11. Remove diskette from disk drive. Label and file diskette (if applicable).
12. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# KEY, PRINT AND STORE TRANSPARENCY MASTERS FOR PRESENTATION FROM LEGIBLE LONGHAND OR EDITED ROUGH DRAFT USING PRESENTATION SOFTWARE.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes instructions on preparing visual aids
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare, print and store the following to be used in a presentation:**

Six transparency masters
a. Use bullets
b. Use clip art
c. Use appropriate font size
d. Use graphic lines

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

Each of the following will be used at least once:

Clip art
Bullets
Appropriate font size
Graphic lines

The six visuals will be input in a presentation software package and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
4. Keyboard the visuals. Save frequently.
5. Run spell check.
6. Proofread visuals while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
7. Print visuals.
8. Proofread and edit hard copy of visuals using proofreader's symbols to indicate changes.
9. Input corrections to visuals (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Store/Save visuals.
12. Print visuals.
13. Remove diskette from disk drive. Label and file diskette (if applicable).
14. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# PLAN AND CREATE DATABASE, INPUT AND UPDATE DATA INTO RECORDS, STORE DATABASE AND PRINT QUICK REPORTS FROM DATABASE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible copy to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing databases
Equipment/software manuals

### WORK TO BE PERFORMED

**Perform the following functions related to a database:**

Create and input a database with 15 names and mailing addresses (minimum of seven fields using date, alphabetic and numeric fields).
Sort records in the database two ways.
Generate and print quick reports.

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The database must be set up (minimum of seven fields using date, alphabetic and numeric fields).

The 15 records must be input into the database and be error free when printed.

The database will be sorted at least two ways (by fields) and reports generated.

The reports will be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.

3. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
4. Create database. (Determine number of fields and content of each field; insert, delete and update records as needed.)
5. Keyboard the data into appropriate fields or revise the data in the records. Save frequently if database is lengthy.
6. Run spell check, if appropriate.
7. Proofread database while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
8. Print database.
9. Proofread and edit hard copy of database using proofreader's symbols to indicate changes.
10. Input corrections to database (use insert, delete, move, copy and search and replace commands).
11. Repeat step 8 - 10 until all errors have been found and corrected.
12. Sort database at least two ways (e.g. by ZIP Code and alphabetically by last name) and generate reports.
13. Store/Save databases.
14. Print reports.
15. Remove diskette from disk drive. Label and file diskette (if applicable).
16. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# CREATE SPREADSHEET, INPUT DATA INTO SPREADSHEET, UPDATE DATA IN SPREADSHEET AND STORE SPREADSHEET.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Legible rough draft of spreadsheet to be created
Disk containing stored spreadsheet
Printed copy of stored spreadsheet with legible additions and changes to be keyed
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing spreadsheets
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare (create and input data) spreadsheet and open and edit stored spreadsheet; print and store the following two spreadsheets:**

One-page (10 rows x 4 columns) spreadsheet from legible rough draft
One-page, stored spreadsheet with inserting/deleting columns and rows, changing data alignment, totaling rows and columns

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The two documents will be input into a spreadsheet and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Retrieve spreadsheet.

4. Revise the data in the spreadsheet.
5. Set up format (margins, spacing, type style and size, page length, tabs, special features, header or footer, pagination, style sheet, etc.).
6. Create spreadsheet (determine number of rows and columns).
7. Keyboard the data into appropriate cells.
8. Run spell check.
9. Proofread spreadsheets while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, formulas, etc.
10. Print spreadsheets.
11. Proofread and edit hard copy of spreadsheets using proofreader's symbols to indicate changes.
12. Input corrections to spreadsheets (use insert, delete, move, copy and search and replace commands).
13. Repeat steps 10 - 12 until all errors have been found and corrected.
14. Store/Save spreadsheets.
15. Print spreadsheets.
16. Remove diskette from disk drive. Label and file diskette (if applicable).
17. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# CREATE AND UPDATE DOCUMENTS USING DESKTOP PUBLISHING FEATURES OF A WORD PROCESSING PACKAGE OR DESKTOP PUBLISHING SOFTWARE PACKAGE.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software including clip art and a variety of fonts
Printer
Articles for the newsletter on a disk
Legible draft of flier
Draft of layout of newsletter
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes guidelines for desktop publishing
Equipment/software manuals

### WORK TO BE PERFORMED

**Create and update the following two publications:**

One-page flier with graphics
Two-page, two-column newsletter containing six articles with one graphic between the columns (wrap the text around the graphic)

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

The text and graphics for the flier and newsletter will be placed into a word processing or desktop publishing computer program and be error free when printed for evaluation.

Graphics, text boxes, graphic lines, captions, layout, font choice, font size, use of drop caps, etc., must be appealing and appropriate.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.

3. Determine layout of publications.
4. Retrieve publications.
5. Keyboard the text and place graphics into publications. Save frequently.
6. Create publications.
7. Run spell check.
8. Proofread publications while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
9. Print publications.
10. Proofread and edit hard copy of publications using proofreader's symbols to indicate changes.
11. Input corrections to publications (use insert, delete, move, copy and search and replace commands).
12. Review layout and design and change publications as needed to make them more appealing and eye-catching to the reader.
13. Repeat steps 9 - 12 until all errors have been found and corrected.
14. Store/Save publications.
15. Print publications.
16. Remove diskette from disk drive. Label and file diskette (if applicable).
17. Log off of computer (if applicable).

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## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# ASSEMBLE SLIDE SHOW, SPEAKER NOTES AND HANDOUTS OF SLIDES USING PRESENTATION SOFTWARE.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Nine slides for slide show
Legible draft of speaker notes
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes instructions on preparing visual aids
Equipment/software manuals

### WORK TO BE PERFORMED

**Prepare the following using presentation software and nine existing slides:**

Slide show that is 2½ minutes long
Speaker notes
Handouts of slides

### PERFORMANCE CRITERIA

Two hours* will be given to complete the computer projects.

The nine slides must be used to create a 2½ minute slide show using a presentation software package.

Speaker notes for the slide show and handouts of the slides must be prepared.

The slide show will be shown and speaker notes and handouts of the slides will be error free when printed and submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Put slide show together using the nine existing slides.

4. Set up format (margins, spacing, type style and size, page length, tabs, special features, headers or footers, pagination, style sheet, etc.).
5. Keyboard the document. Save frequently.
6. Run spell check.
7. Proofread speaker notes and handouts while still on monitor and input corrections; proofread for correctness of content, format, grammar, punctuation, capitalization and word divisions.
8. Print speaker notes and handouts of slides.
9. Proofread and edit hard copy of speaker notes and handouts using proofreader's symbols to indicate changes.
10. Input corrections to speaker notes and handouts (use insert, delete, move, copy and search and replace commands).
11. Repeat steps 8 - 10 until all errors have been found and corrected.
12. Store/Save document.
13. Print speaker notes and handouts of slides.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# OPEN/RETRIEVE STORED DATABASE; RENAME, INSERT, MOVE AND DELETE FIELDS; USE QUERIES AND GENERATE REPORT; CUSTOMIZE REPORT (ADD TITLE, GRAPHICS, FUNCTIONS).

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Database on disk
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing databases
Equipment/software manuals

### WORK TO BE PERFORMED

**Open/retrieve stored database and perform the following:**

Open database with 30 names and mailing addresses (minimum of 7 fields using date, alphabetic and numeric fields).
Rename, insert, move and delete fields.
Use queries, conditions and/or statement function.
Design and use conditional queries based on database structure.
Customize report (add title, graphics, functions).
Print report.

### PERFORMANCE CRITERIA

One and one-half hours* will be given to complete the computer projects.

The database will be manipulated according to instructions (see Work to Be Performed).

The report generated will be in the correct format and error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AID ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.

2. Review draft copy and any special instructions from originator.
3. Open database and rename, insert, move and delete fields as directed.
4. Use queries to generate the report.
5. Run spell check, if appropriate.
6. Proofread database while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
7. Print report.
8. Proofread and edit hard copy of report using proofreader's symbols to indicate changes.
9. Input corrections to report (use insert, delete, move, copy and search and replace commands).
10. Repeat steps 7 - 9 until all errors have been found and corrected.
11. Customize report as instructed (add title, graphics, functions).
12. Store/Save report.
13. Print report.
14. Remove diskette from disk drive. Label and file diskette (if applicable).
15. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# RETRIEVE SPREADSHEETS, COPY DATA FROM ONE SPREADSHEET TO ANOTHER, LINK SPREADSHEETS, EDIT DATA IN A LINKED SPREADSHEET, PRINT AND STORE SPREADSHEETS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Two spreadsheets on a disk
Computer
Appropriate software
Printer
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing spreadsheets
Equipment/software manuals

### WORK TO BE PERFORMED

Copy data from one spreadsheet to another and print.

Link data between two spreadsheets.

Edit data in linked spreadsheet and print.

Prepare a document showing steps for copying data and for linking two spreadsheets.

### PERFORMANCE CRITERIA

One hour* will be given to complete the computer projects.

The two spreadsheets will be retrieved, data copied, two spreadsheets linked and data edited in linked spreadsheet.

The spreadsheets will be error free when printed for evaluation.

Steps for copying data and for linking two spreadsheets will be error free when submitted for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.

3. Copy data from one spreadsheet to another spreadsheet.
4. Print spreadsheet.
5. Link two spreadsheets.
6. Edit data in one of linked spreadsheets.
7. Print both spreadsheets.
8. Keyboard steps for copying data and for linking two spreadsheets.
9. Print steps for copying data and for linking two spreadsheets.
10. Proofread and edit hard copy of steps using proofreader's symbols to indicate changes.
11. Input corrections to document (use insert, delete, move, copy and search and replace commands).
12. Repeat steps 9 - 11 until all errors have been found and corrected.
13. Store/Save document.
14. Print document.
15. Remove diskette from disk drive. Label and file diskette (if applicable).
16. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# CREATE GRAPHS AND CHARTS FROM SPREADSHEETS.



## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Spreadsheet file
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing charts and graphs
Equipment/software manuals

### WORK TO BE PERFORMED

**Create, print and store the following charts/graphs from a spreadsheet:**

Pie chart (flat and 3D)
Bar graph (plain and stacked)
Line graph

### PERFORMANCE CRITERIA

Forty-five minutes* will be given to complete the computer projects.

The data for the pie chart, bar and line graphs will be on a file in a spreadsheet program.

The graphs and chart will be created from a spreadsheet and will be error free when printed for evaluation.

The chart and graphs should be modified (change size, format, etc.) as appropriate.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review any special instructions from originator.
3. Retrieve spreadsheet.
4. Determine type of chart and graphs to best illustrate the data.
5. Create appropriate chart and graphs.

6. Modify the chart and graphs as needed (change size, format, fonts, etc.). Save frequently if data is lengthy.
7. Run spell check, if appropriate.
8. Proofread data while still on monitor and input corrections; proofread for correctness of content, format, punctuation, capitalization, etc.
9. Print chart and graphs.
10. Proofread and edit hard copy of chart and graphs using proofreader's symbols to indicate changes.
11. Input corrections to chart and graphs (use insert, delete, move, copy and search and replace commands).
12. Repeat steps 9 - 11 until all errors have been found and corrected.
13. Store/Save documents.
14. Print chart and graphs.
15. Remove diskette from disk drive. Label and file diskette (if applicable).
16. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

# IMPORT GRAPHICS, SPREADSHEETS, TEXT AND DATA INTO WORD PROCESSING DOCUMENTS.

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following equipment and materials:**

Verbal and/or written instructions
Computer
Appropriate software
Printer
Two-page report on disk
Files to be imported
Reference books such as a dictionary, word division manual, punctuation guide and capitalization guide
Office reference manual that includes information on preparing reports with graphics, spreadsheets, text and data
Equipment/software manuals

### WORK TO BE PERFORMED

**Retrieve report, import files, print and store the following business document:**

Retrieve two-page report prepared in word processing software program.
Import graphics, spreadsheets, text and data into document.

### PERFORMANCE CRITERIA

One-half hour* will be given to complete the computer project.

The document will be input in report format with appropriate files imported and be error free when printed for evaluation.

**This does not allow for interruptions.*

## PERFORMANCE ELEMENTS AND ASSESSMENT CRITERIA

1. Ready equipment.
   a. Turn on microcomputer or
   b. Log on computer if using terminal/computer mainframe or minicomputer.
   c. Turn on printer, load and adjust paper.
2. Review draft copy and any special instructions from originator.
3. Retrieve/open the two-page report.
4. Import appropriate files at designated locations. Save frequently.
5. Proofread for correctness of location of imported files.
6. Print document.

7. Proofread and edit hard copy of document using proofreader's symbols to indicate changes.
8. Input corrections to document (use insert, delete, move, copy and search and replace commands).
9. Repeat steps 6 - 8 until all errors have been found and corrected.
10. Store/Save document.
11. Print report.
12. Remove diskette from disk drive. Label and file diskette (if applicable).
13. Log off of computer (if applicable).

*The steps of performance have been numbered to show an appropriate sequence of completing the work to be performed; however, a different sequence may be used to perform the work.*

## ASSESSMENT AND CREDENTIALING APPROACH

Performance Test - See the skill standard.

Written test on related academics and knowledge needed to complete skill standard.

| | |
|---|---|
| **Academic Skills** | Skills (and related knowledge) contained in the subject areas and disciplines addressed in most national and state educational standards, including English, mathematics, science, etc. |
| **Assessment** | A process of measuring performance against a set of standards through examinations, practical tests, performance observations and/or the completion of work portfolios. |
| **Content Standard** | A specification of what someone should know or be able to do to successfully perform a work activity or demonstrate a skill. |
| **Critical Work Functions** | Distinct and economically meaningful sets of work activities critical to a work process or business unit which are performed to achieve a given work objective with work outputs that have definable performance criteria. A critical work function has three major components:<br>• **Conditions of Performance:** The information, tools, equipment and other resources provided to a person for a work performance.<br>• **Work to Be Performed:** A description of the work to be performed.<br>• **Performance Criteria:** The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedure requirements (e.g., safety, standard professional procedures) and time and resource requirements. The IOSSCC requires that these performance criteria be further specified by more detailed individual performance elements and assessment criteria. |
| **Credentialing** | The provision of a certificate or award to an individual indicating the attainment of a designated set of knowledge and skills and/or the demonstration of a set of critical work functions for an industry/ occupational area. |
| **Illinois Occupational Skill Standards and Credentialing Council (IOSSCC)** | Legislated body representing business and industry which establishes skill standards criteria, endorses final products approved by the industry subcouncil and standards development committee and assists in marketing and dissemination of occupational skill standards. |
| **Industry** | Type of economic activity, or product or service produced or provided in a physical location (employer establishment). They are usually defined in terms of the Standard Industrial Classification (SIC) system. |

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| **Industry Subcouncil** | Representatives from business/industry and education responsible for identifying and prioritizing occupations for which occupational performance skill standards are adapted, adopted or developed. They establish standards development committees and submit developed skill standards to the IOSSCC for endorsement. They design marketing plans and promote endorsed skill standards across the industry. |
| **Knowledge** | Understanding the facts, principles, processes, methods and techniques related to a particular subject area, occupation or industry. |
| **Occupation** | A group or cluster of jobs, sharing a common set of work functions and tasks, work products/services and/or worker characteristics. Occupations are generally defined in terms of a national classification system including the Standard Occupational Classification (SOC), Occupational Employment Statistics (OES) and the Dictionary of Occupational Titles (DOT). |
| **Occupational Cluster** | Grouping of occupations from one or more industries that share common skill requirements. |
| **Occupational Skill Standards** | Specifications of content and performance standards for critical work functions or activities and the underlying academic, workplace and occupational knowledge and skills needed for an occupation or an industry/occupational area. |
| **Occupational Skills** | Technical skills (and related knowledge) required to perform the work functions and activities within an occupation. |
| **Performance Standard** | A specification of the criteria used to judge the successful performance of a work activity or the demonstration of a skill. |
| **Product Developer** | Individual contracted to work with the standard development committee, state liaison, industry subcouncil and IOSSCC for the adaptation, adoption or development of skill standards content. |
| **Reliability** | The degree of precision or error in an assessment system so repeated measurements yield consistent results. |
| **Skill** | A combination of perceptual, motor, manual, intellectual and social abilities used to perform a work activity. |
| **Skill Standard** | Statement that specifies the knowledge and competencies required to perform successfully in the workplace. |

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| **Standards Development Committee** | Incumbent workers, supervisors and human resource persons within the industry who perform the skills for which standards are being developed. Secondary and postsecondary educators are also represented on the committee. They identify and verify occupational skill standards and assessment mechanisms and recommend products to the industry subcouncil for approval. |
| **State Liaison** | Individual responsible for communicating information among all parties (IOSSCC, subcouncil, standard development committee, product developer, project director, etc.) in skill standard development. |
| **Third-Party Assessment** | An assessment system in which an industry-designated organization (other than the training provider) administers and controls the assessment process to ensure objectivity and consistency. The training provider could be directly involved in the assessment process under the direction and control of a third-party organization. |
| **Validity** | The degree of correspondence between performance in the assessment system and job performance. |
| **Workplace Skills** | The generic skills essential to seeking, obtaining, keeping and advancing in any job. These skills are related to the performance of critical work functions across a wide variety of industries and occupations including problem solving, leadership, teamwork, etc. |

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| **Margaret Blackshere** | AFL-CIO |
| **Hollis Earnest** | Manufacturing/Electronics |
| **David Emerson** | Downstate National Bank |
| **Bernard Gregory** | Passavant Hospital |
| **Michael O'Neill** | Chicago Building Trades Council |
| **Janet Payne** | United Samaritans Medical Center |
| **Gerald Schmidt** | Illinois Manufacturing Association<br>Caterpillar |
| **Jim Schultz** | Illinois Retail Merchants Association<br>Walgreen Company |
| **Larry Vaughn** | Illinois Chamber of Commerce |

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| **Barbara Abrahamson** | Field Service Director<br>Illinois Federation of Teachers #801 |
| **Marcus W. Acheson IV** | Executive Vice President and Department Head<br>Bank of America of Illinois |
| **Gail L. Bahar** | Assistant Vice President, Human Resources Officer<br>Seaway National Bank |
| **Coleen Callahan** | Human Resources Manager<br>Mayer, Brown & Platt |
| **Kenneth Cavanaugh** | Vice President, Human Resources<br>Memorial Health System |
| **Dale T. Chapman** | President<br>Lewis and Clark Community College |
| **John P. Coffey** | Vice President, Personnel<br>State Farm Insurance Companies |
| **Frank Danes** | Associate Superintendent for Management Support<br>Oak Park/River Forest High School District #200 |
| **Mike English** | PMA Financial Network, Inc. |
| **Darlene Furst** | Subcouncil Chair and President<br>Furst Staffing Services |
| **Ethel Holladay** | Illinois Business Education Association<br>DuQuoin High School |
| **Karen Keasler** | Illinois Community College Career Dean's Association<br>Business Division Chairperson<br>Southeastern Illinois College |
| **Jeanette Lipe** | President<br>HR Solutions, Inc. |
| **Wanda Liptow** | Vice President, Manager of Human Relations<br>AMCORE Bank N.A., Rockford |
| **Angelia Millender** | Robert Morris College |

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| **Patrick O'Connor** | Vice President<br>Human Resources and Administrative Services<br>Blue Cross and Blue Shield of Illinois |
| **Dorothy Ragsdale** | Director of Human Resources<br>American Library Association |
| **William Setterstrom** | Senior Vice President, Human Resources<br>The Northern Trust Company |
| **Phoebe Stevenson** | Director, Human Resources<br>Celtic Life Insurance Company |
| **Fred Weber** | Director, Human Resources<br>Coopers & Lybrand |
| **Tony Zahn** | Chicago Region Vice President<br>Kelly Services |
| **Gerry Gaedtke** | Project Consultant and Subcouncil Liaison<br>Northern Illinois University |
| **Roger Uhe** | State Liaison<br>Illinois State Board of Education |

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| **Joseph A. Bonefeste, Ph.D.** | Chair, Executive Director<br>Illinois Health Care Cost Containment Council |
| **Jane Clark** | Clinical Educator<br>The Glenbrook Hospital |
| **Lucille Davis, R.N., Ph.D.** | Dean, College of Nursing & Allied Health Professions<br>Chicago State University |
| **Pia Davis** | Vice President, SEIU #73 |
| **Virginia Duffy** | Health Services Administrator |
| **Edward J. Fesco, M.D.** | Physician |
| **Paula Garrott, Ed.M., MT (ASCP), CLS (NCA)** | Associate Professor and Director<br>Clinical Laboratory Science Program<br>University of Illinois at Springfield |
| **Debra Goddard** | Medical Center Educator<br>Veterans Administration Medical Center |
| **Rose Hall** | Belleville Area College |
| **Jackie King, Ph.D.** | Nursing Research Consultant<br>Southern Illinois University - Carbondale |
| **Nancy Krier** | Illinois Hospital Association |
| **Cheryl Lowney** | Senior Vice-President, Nursing Services<br>Heritage Enterprises |
| **Dana Lynn** | Southern Illinois District Council of Laborers |
| **Jan Matuska, R.N.** | Curriculum Coordinator<br>Pekin High School |
| **Peter Paulson, D.D.S.** | Secretary, Illinois State Dental Society |
| **Creighton J. Petkovich** | United Samaritans Medical Center |
| **Jane B. Pond, L.P.N.** | President, Licensed Practical Nurses Association of Illinois |

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| **Wanda Ryan, R.N.** | Director/Administrator<br>MacNeal Home Care Services |
| **Jerry Sideman** | Vice-President, Human Resources<br>Northwestern Memorial Hospital |
| **Kevin Smith, M.D.** | Medical Director, Dreyer Clinic |
| **Carol Soetcher** | Nurse Administrator<br>Freeport Memorial Home Health Care |
| **Gloria Tarvin** | Chairperson of Allied Health/Nursing<br>Rehabilitative Institute of Chicago |
| **Dr. Walter Zinn** | Optometrist |
| **Kathryn Torricelli** | State Liaison<br>Illinois State Board of Education |

## APPENDIX D

## MEDICAL OFFICE STANDARDS DEVELOPMENT COMMITTEE

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| **Ann Collins** | S.I.U. School of Medicine |
| **Susan Butjahr, ART, CPC** | Medical Records Director<br>Sparta Community Hospital |
| **Elizabeth Butler** | Chatham |
| **Sandy Collier** | Workers Compensation Claims Specialist |
| **Charlotte Henry** | Asistant Director/Coding Supervisor, H.I.S. |
| **Wendy Holder, RRA** | Belleville Area College |
| **Pam Logan** | Administrative Assistant<br>Marshall Browing Hospital |
| **Janice Nussman** | Springfield |
| **David Rubin** | Jacksonville |
| **Verna Theismen, ART** | Assistant Director, Health Information Services<br>St. Elizabeth's Hospital |
| **Ellen Wachs** | Director, Health Information Services<br>United Samaritans Medical |
| **Brenda Waller** | Marshall Browning Hospital |
| **Carole Wieczorek, CMA** | Certified Medical Office Assistant |

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| **Marilyn Satterwhite** | Product Developer<br>Office Systems Instructor<br>Danville Area Community College |
| **Gerry Gaedtke** | Project Consultant and Subcouncil Liaison<br>Northern Illinois University |
| **Kathryn Terricelli** | State Liaison<br>Illinois State Board of Education |
| **Roger Uhe** | State Liaison<br>Illinois State Board of Education |

## I. Occupational Definition and Justification

### A. Occupational Definition

The Business and Administrative Services Subcouncil as well as the Standards Development Committee for the Medical Office Occupations Cluster identified the occupations for which performance skill standards would be developed in this cluster. The medical office occupations include the following job titles and descriptions:

#### 1. Level 1: Health Care Clerical Personnel or Medical Clerical Support Personnel

Organizes and plans by prioritizing own work, taking notes, establishing and maintaining a reminder system, distributing materials, demonstrating office procedures and equipment as appropriate, delegating work to others when applicable and improving office procedures. May requisition, inventory and maintain office supplies and equipment as well as perform routine maintenance on office equipment. May perform medical office activities such as scheduling appointments, receiving and storing medical supplies, maintaining reception room and acting as Notary Public.

May prepare medical records and insurance forms by assisting patients with registration process, completing third-party-payer forms and completing birth certificates. May perform financial duties such as collecting and processing fees, issuing receipts, inspecting invoices for accuracy and preparing and posting petty cash vouchers.

May manage records and files by establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages. May perform other office duties such as performing receptionist duties, getting documents notarized and searching informational sources. May perform information processing duties. (Other possible job titles include Admitting/Registration Clerk, Unit/Ward Secretary, Health Information Clerk, Medical Records Clerk, Medical Receptionist, Medical Clerk Typist, Appointment Scheduler, Patient Communications Specialist, Health Information Abstracter.)

#### 2. Level 2: Health Information Processor

Organizes and plans by prioritizing own work, taking notes, establishing and maintaining a reminder system, distributing materials, demonstrating office procedures and equipment as appropriate, delegating work to others when applicable and improving office procedures. May requisition, inventory and maintain office supplies and equipment as well as perform routine maintenance on office equipment.

May perform medical office activities such as acting as Notary Public, reviewing technical journals for articles of interest and making entries in communication log. May perform medical dictation/transcription duties. May prepare medical records and insurance forms by preparing entry-level coding appropriate to physician's office or clinic and reviewing medical records for completeness and accuracy. May manage records and files by establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages. May perform other office duties including receptionist duties, getting documents notarized, searching informational sources, answering routine correspondence and taking minutes at meetings. May perform information processing activities. (Other possible jobs include Medical Transcriptionist/Medical Language Specialist, Discharge Analyst/Records Processor, Correspondence Secretary and Medical Insurance Specialist.)

3. **Level 3: Medical Secretarial Personnel**

Organizes and plans by prioritizing own work, keeping appointment calendar for supervisor, planning on-site meetings, making domestic and international travel arrangements and preparing itinerary, delegating work to others when applicable, arranging for one- and three-day off-site conferences, planning receptions and dinners, making travel arrangements for clients and visitors, composing and updating written office procedures, developing liaisons with professional organizations and planning and recommending physical layout of the office.

May maintain and inventory equipment, supplies and software. May perform medical office activities such as scheduling appointments, receiving and storing medical supplies, maintaining reception room, acting as Notary Public and reviewing technical journals for articles of interest.

May perform medical dictation/transcription duties by taking verbatim dictation using shorthand or speedwriting, taking dictation directly at the computer and transcribing medical documents. May prepare medical records and insurance forms by registering new and established patients, doing basic coding appropriate to specific practice (excluding hospitals), reviewing medical records for completeness and accuracy and completing third-party-payer forms.

May perform financial duties for the medical office by collecting fees and issuing receipts, completing payment vouchers, preparing checks, maintaining checkbook and reconciling bank statement, preparing travel vouchers, categorizing expenses and preparing expense reports, making journal entries, maintaining income and expense records, preparing office payroll and appropriate tax withholding reports and handling petty cash.

May manage records and files by establishing and maintaining a filing system, retrieving information from files and maintaining confidential files. May handle all aspects of mail including faxes, e-mail and packages.

May perform other office duties including receptionist duties, getting documents notarized, searching informational sources, maintaining personnel files and employee attendance/time sheets/vacation records, answering routine correspondence and taking minutes at meetings. May perform information processing activities. (Other possible job titles include Medical Secretary, Medical Staff Secretary, Administrative Secretary, Medical Department Secretary and Medical Secretary/Office Coordinator.)

The performance areas identified for these occupations include:

- Organization and Planning
- Maintenance of Equipment and Supplies
- Medical Office Activities
- Medical Dictation/Transcription Duties
- Preparation of Medical Records and Insurance Forms
- Financial Functions
- Management of Records and Files
- Mail Handling
- Basic Office Operations
- Information Processing Activities
- Word Processing
- Machine Transcription
- Basic Data Processing
- Computer File Manipulation
- Document Processing
- Database and Spreadsheet Operations
- Computer Applications

### B. Employment and Earnings Opportunities

This occupational cluster does require basic workplace skills and technical training.

#### 1. Employment Opportunities

Rapid growth of medical occupations and a growing use of computers to store and retrieve information is expected to increase demand for qualified persons in the medical office occupations arena. Detailed information required for insurance companies and Medicare should also stimulate employment growth in this field. However, growth may be limited somewhat because of productivity gains being made possible by automation. Numerous job opportunities are projected for the occupations in all levels of this occupational cluster.

#### 2. Earnings Opportunities

| | *Middle Range Annual Earnings 1996 |
|---|---|
| Health Care Clerical Personnel | $13,830 - 19,425 |
| Health Information Processors | $16,640 - 20,800 |
| Medical Secretarial Personnel | $17,430 - 22,510 |

**Middle Range is the middle 50%, i.e., one-fourth of persons in the occupation earn below the bottom of the range and one-fourth of persons in the occupation earn above the top of the range.*

Source: 1996 Occupational Wage Survey, Illinois Department of Employment Security (IDES), Economic Information and Analysis Division; Horizons Career Information System; and A Guide to Health Careers in Illinois, Western Illinois University.

### C. Career Opportunities and Education and Training Requirements

The occupations do possess technical, workplace and related academic skills. The identification of academic skills in relation to the skill standards will use the Illinois Learning Standards where possible.

## II. Occupational Standards and Credentials

### A. Occupational Standards (See attached standards.)

### B. Assessment and Credentialing System

Some existing assessment and licensure exams cover parts of these occupations in the licensure exams, i.e. Certified Professional Secretary covers many of the information processing skills. There are also many written exams which would cover the medical office occupations cluster, i.e. V-TECS (Vocational-Technical Education Consortium of States). However, credentialing is not available through V-TECS. The subcouncil will review standards presented. The need for credentialing or certification will be reviewed with strong consideration being given to embedding the assessment in instruction provided at the training site. The assessment will be valid and reliable.

## III. Industry Support and Commitment

### A. Industry Commitment for Developing and Updating

1. These performance skill standards were developed through the subcouncil and standards development committee efforts. The development effort utilized the following steps:

   a. Identification of performance skills
   b. Review of resources
   c. Identification of Standards Development Committee
   d. Validation and approval of performance skills by Standards Development Committee
   e. Development of draft performance skill standards
   f. Review of skill standards by Standards Development Committee
   g. Review and approval of the skill standards by subcouncil
   h. Approval of the skill standards by the subcouncil

2. Lists of the Business and Administrative/Information Services and Health and Social Services Subcouncils are located in Appendix C and the list of the Medical Office Occupations Standards Development Committee members is located in Appendix D.

### B. Industry Commitment for Marketing

The Business and Administrative/Information Services and the Health and Social Services Subcouncils are committed to marketing and obtaining support and endorsement from the business community impacted by these skill standards.

The Subcouncils will encourage the availability of occupational skill standards to the public including learners, parents, workers, educators at all levels, employers and industry organizations.

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| **A. Developing an Employment Plan** | 1. Match interests to employment area.<br>2. Match aptitudes to employment area.<br>3. Identify short-term work goals.<br>4. Match attitudes to job area.<br>5. Match personality type to job area.<br>6. Match physical capabilities to job area.<br>7. Identify career information from counseling sources.<br>8. Demonstrate a drug-free status. |
| **B. Seeking and Applying for Employment Opportunities** | 1. Locate employment opportunities.<br>2. Identify job requirements.<br>3. Locate resources for finding employment.<br>4. Prepare a resume.<br>5. Prepare for job interview.<br>6. Identify conditions for employment.<br>7. Evaluate job opportunities.<br>8. Identify steps in applying for a job.<br>9. Write job application letter.<br>10. Write interview follow-up letter.<br>11. Complete job application form.<br>12. Identify attire for job interview. |
| **C. Accepting Employment** | 1. Apply for social security number.<br>2. Complete state and federal tax forms.<br>3. Accept or reject employment offer.<br>4. Complete employee's Withholding Allowance Certificate Form W-4. |
| **D. Communicating on the Job** | 1. Communicate orally with others.<br>2. Use telephone etiquette.<br>3. Interpret the use of body language.<br>4. Prepare written communication.<br>5. Follow written directions.<br>6. Ask questions about tasks. |
| **E. Interpreting the Economics of Work** | 1. Identify the role of business in the economic system.<br>2. Describe responsibilities of employee.<br>3. Describe responsibilities of employer or management.<br>4. Investigate opportunities and options for business ownership.<br>5. Assess entrepreneurship skills. |
| **F. Maintaining Professionalism** | 1. Participate in employment orientation.<br>2. Assess business image, products and/or services.<br>3. Identify positive behavior.<br>4. Identify company dress and appearance standards.<br>5. Participate in meetings in a positive and constructive manner.<br>6. Identify work-related terminology.<br>7. Identify how to treat people with respect. |

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| **G. Adapting to and Coping with Change** | 1. Identify elements of job transition.<br>2. Formulate a transition plan.<br>3. Identify implementation procedures for a transition plan.<br>4. Evaluate the transition plan.<br>5. Exhibit ability to handle stress.<br>6. Recognize need to change or quit a job.<br>7. Write a letter of resignation. |
| **H. Solving Problems and Critical Thinking** | 1. Identify the problem.<br>2. Clarify purposes and goals.<br>3. Identify solutions to a problem and their impact.<br>4. Employ reasoning skills.<br>5. Evaluate options.<br>6. Set priorities.<br>7. Select and implement a solution to a problem.<br>8. Evaluate results of implemented option.<br>9. Organize workloads.<br>10. Assess employer and employee responsibility in solving a problem. |
| **I. Maintaining a Safe and Healthy Work Environment** | 1. Identify safety and health rules/procedures.<br>2. Demonstrate the knowledge of equipment in the workplace.<br>3. Identify conservation and environmental practices and policies.<br>4. Act during emergencies.<br>5. Maintain work area.<br>6. Identify hazardous substances in the workplace. |
| **J. Demonstrating Work Ethics and Behavior** | 1. Identify established rules, regulations and policies.<br>2. Practice cost effectiveness.<br>3. Practice time management.<br>4. Assume responsibility for decisions and actions.<br>5. Exhibit pride.<br>6. Display initiative.<br>7. Display assertiveness.<br>8. Demonstrate a willingness to learn.<br>9. Identify the value of maintaining regular attendance.<br>10. Apply ethical reasoning. |
| **K. Demonstrating Technological Literacy** | 1. Demonstrate basic keyboarding skills.<br>2. Demonstrate basic knowledge of computing.<br>3. Recognize impact of technological changes on tasks and people. |
| **L. Maintaining Interpersonal Relationships** | 1. Value individual diversity.<br>2. Respond to praise or criticism.<br>3. Provide constructive praise or criticism.<br>4. Channel and control emotional reactions.<br>5. Resolve conflicts.<br>6. Display a positive attitude.<br>7. Identify and react to sexual intimidation/harassment. |
| **M. Demonstrating Teamwork** | 1. Identify style of leadership used in teamwork.<br>2. Match team member skills and group activity.<br>3. Work with team members.<br>4. Complete a team task.<br>5. Evaluate outcomes. |

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